

# Impact of COVID-19 on labour migration from EaP countries to the EU

EaP CSF **COVID-19** POLICY PAPER

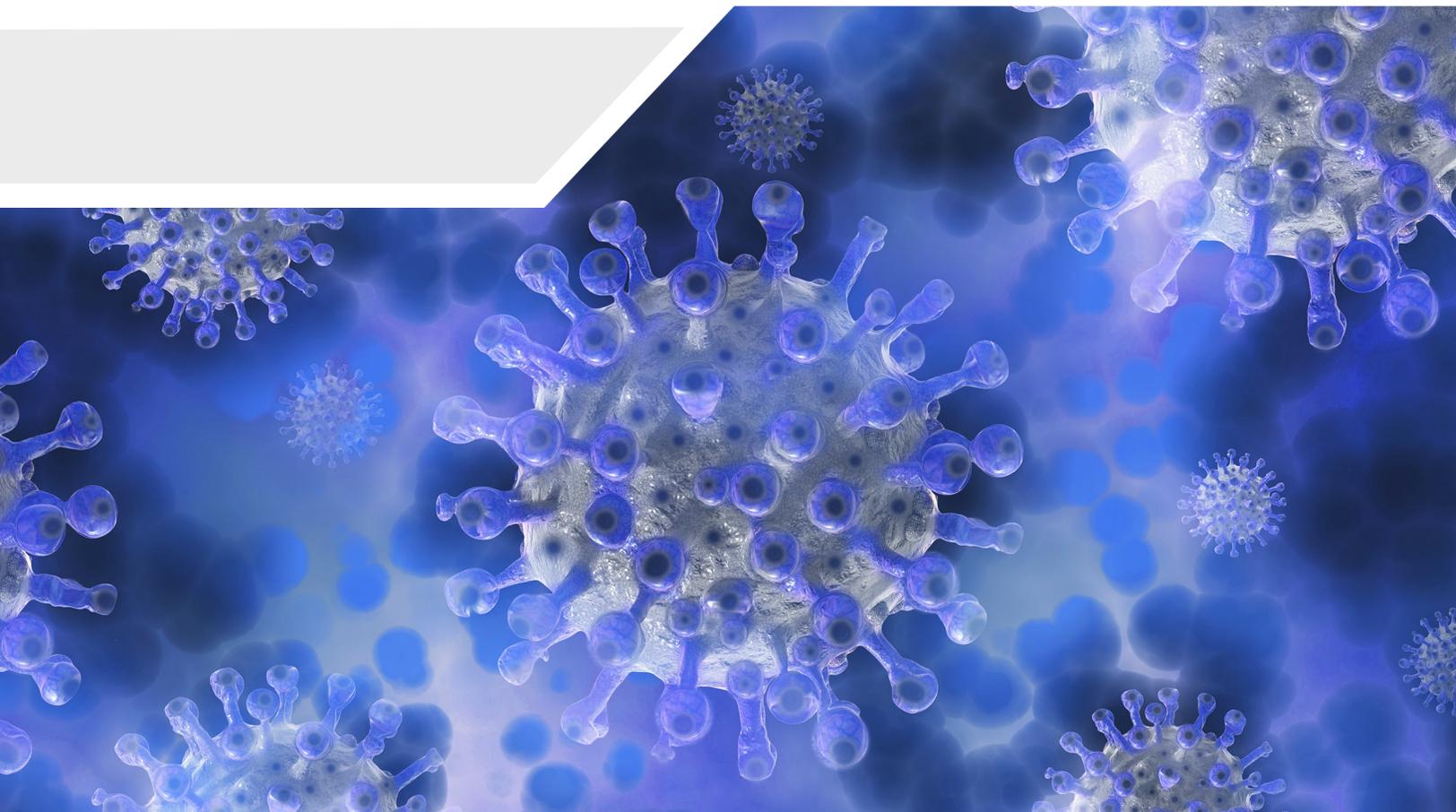
#PrepareEaP4Health

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## **LIST OF ABBREVIATIONS**

**CIS** – Commonwealth of Independent States

**CSO** – Civil Society Organisations

**EaP** – Eastern Partnership

**EaP CSF** – Eastern Partnership Civil Society Forum

**EBRD** – European Bank for Reconstruction and Development

**ETUC** – European Trade Union Confederation

**EU** – European Union

**IDP** – Internally Displaced People

**IOM** – International Organisation for Migration

**ILO** – International Labour Organisation

**GDP** - Gross Domestic Product

**GVC** – Global Value Chain

**OECD** – Organisation for Economic Co-operation and Development

**PPE** – Personal Protective Equipment

**SOE** – State-Owned Enterprise

**WG** – Working Group (unit within the Eastern Partnership Civil Society Forum)

**WHO** – World Health Organisation

## EXECUTIVE SUMMARY

The COVID-19 pandemic dramatically altered international migration. Before the crisis, increasing outflows were registered in the Eastern Partnership (EaP) – a region that is chronically affected by human capital depletion. Roughly 16% of the EaP population lives abroad, with Armenia (33%) and Moldova (28%) having the region's largest emigrant populations (OECD, 2020b). This is the result of an increasing proportion of the population opting, or being forced, to seek economic opportunities abroad. Although labour migrants from EaP countries already faced social exclusion in many EU countries, the COVID-19 crisis has exacerbated the situation for migrant workers in or from the EaP countries due to two main factors: exposure to the virus and income loss (ibid.). However, it is too early to assess the magnitude of COVID-19's impact on the number of labour migrants and remittance flows, and indeed to determine whether those effects are merely temporary, or whether they will have longer-term consequences.

When the pandemic hit, many migrant workers were stranded in foreign countries without work and unable to support their families back home. In some cases, they found themselves obliged to return home, while in others, they were unable to leave their host countries at all. Border closures were particularly harmful for seasonal workers, who usually travel abroad during spring to pursue employment in the agricultural and tourism sectors of the host countries. In 2020, the uncertainty of the labour market within the EU spurred a wave of returnees to the Eastern Partnership countries who have now sought re-integration at home at a time when those who did not leave their host country have struggled to adapt and survive.

The main findings of this paper's research are as follows:

### I. Migrational flows

- **COVID-19 caused the return of approximately one third of EaP migrants.** Returning migrants were forced to return home or to re-evaluate their work prospects, with many still unable to return and reunite with their families.
- **COVID-19 revealed significant dependence on EaP migrant workers within essential sectors of the economy in the EU member states, including the informal economy.** A majority of labour migrants from Eastern Europe are over-represented in low-skilled but essential professions - e.g. personal care workers in health services, drivers, transport and storage labourers, food processing workers – with the COVID-19 crisis revealing the EU countries' strong dependence on such migrants workers.
- **The COVID-19 pandemic has exacerbated pre-existing vulnerabilities.** The EaP region's fragile labour market is characterised by limited available job contracts for returning migrants and overall dire job prospects. Thus, the greatest vulnerabilities of labour migration have been catalysed by COVID-19, with systemic income loss and energy, food and mobility poverty having emerged.

- **The crisis has exposed significant data gaps** that have prevented real-time monitoring of remittance flows and migratory movements, including stranded migrants and returning migrants.

## II. Policy responses of the Eastern Partnership governments

- **Labour migrants have not been a target group for tailor-made policy response by national governments in the region.** Despite some measures having been taken, central and local governments lack targeted policies for returning migrants in particular.
- **Returning migrants have limited public health access,** despite the same degree of risk. Social and medical coverage for migrants is incoherently approached by central governments, providing limited alternatives for health protection of the migrant labour force.
- **International donor organisations across the region mainly support diaspora engagement programmes,** while proactive measures to attract investment and entrepreneurial re-integration of returning migrants are not sufficiently developed. However, many migrants have sought alternative means of re-integrating, either through agriculture or the informal economy at home.

## III. Policy responses of the EU member states

- **Virus containment measures have especially affected informal sectors** such as domestic workers and seasonal agriculture, revealing the need to regulate and ensure state intervention in informal economic activity.
- **The pandemic has crystallised the issue of health protection coverage for migrants.** The pandemic was first and foremost a health threat, but simultaneously a financial threat for labour migrants from EaP countries. With a high degree of uncertainty and informality in the labour market, the health care of labour migrants was frequently jeopardised by their precarious socio-economic situation.

## IV. Impact on the achievement of Deliverable 17

- **During the pandemic, the level of mobility decreased** due to health considerations and crisis management measures. However, this period has underlined more than ever the need to have an operational and effective data-based border management system to tackle irregular migration, which is likely to surge after the pandemic.

Based on the above findings, the paper drew up a series of recommendations addressed to the EaP governments, the EU institutions, CSOs, and businesses. The key recommendations are to:

1. **Enhance circular migration programmes** in order to safeguard the premise of “decent work”, to maximise the benefits of well-organised seasonal migration, and to protect migrant workers – both male and female – from exploitation in foreign labour markets.
2. **Develop professional reconversion programmes for returning migrants** in industries with potential labour force shortages, leveraging the existing know-how brought by migrants while offering a gateway to alternative employment through specialised training programmes.
3. **Support cooperation** between governments of host countries and countries of origin on identifying labour force needs and organising labour migration in fields with the highest demand. As long as mobility restrictions are in place, labour migration might occur in a more targeted way, responding mainly to the host countries’ sectoral needs. Therefore, it might be more challenging for individual migrants with other skills sets to find employment abroad legally.

The effort to deliver a policy response to migration issues in the context of the COVID-19 crisis should be more than a reactive, short-term intervention. Indeed, the emerging cross-sectoral turmoil unfolding within the region should serve as a real impetus for concerted human capital development to ensure resilience and recovery; without such an effort, what was initially seen as a ‘brain regain’ during the pandemic could become a permanent brain drain.

## METHODOLOGICAL NOTE

### Conceptual overview

Based on a literature review, the phenomenon of migration in EaP countries analysed in this paper builds on human capital theory, according to which individuals migrate if their expected wage abroad (that is, returns to human capital) exceeds the home country wage, plus migration costs (Sjaastad, 1962).

In order to identify migrant workers, this paper uses the International Labour Organisation definition that determines such a group as “all international migrants who are currently employed or (...) seeking employment in their present country of residence” (ILO, 2015). In this context, countries are regularly divided into sending and host countries (Engbersen & Snel, 2013).

Labour migration is an enduring phenomenon, presenting a long-term challenge for both employers and policymakers (Cseh-Papp et al., 2018; Simionescu, 2016). COVID-19 has underscored the urgency of addressing the phenomenon of labour migration, adding a third driver next to the benefits and costs of migration: the risk of migrants’ worsening situation due to health concerns and economic losses. This is the premise for the current paper, which aims to address

the impact of the COVID-19 pandemic on the Eastern Partnership's labour market and map out the policy responses on both ends of the migration process.

## Methodology

This research aims to ***analyse the impact of the COVID-19 crisis on labour migration in the EaP countries and discuss implications for policy reforms to manage the integration of migrants in education, training, and labour markets.***

The paper based its research on data from March 2020 to February 2021, covering one year of COVID-19 measures concerning labour migration.

The research proceeded in three stages: (i) collecting and analysing information and data on labour migration to and from the EaP countries during the COVID-19 pandemic; (ii) linking the collected data to the implementation of the Deliverable 6 (*Create new job opportunities at the local and regional level*); and (iii) exploring responses for the better management of current and future challenges by national EaP governments, EU bodies, and CSOs, in a way that ensures the transition towards an inclusive future for the benefit of individuals and societies.

This paper used both primary and secondary data sources, including primary surveys of returning migrants and local experts conducted by the author, and secondary quantitative datasets, surveys, and legal texts extracted from international organisations and research institutes: EU, European Commission, Eurostat, OECD, UN, Department of Economic and Social Affairs, EBRD, International Labour Organisation, International Organisation for Migration, UNCTAD and the World Bank.

The paper relied on a qualitative methodology, complemented by quantitative methods, and on a review of existing literature and media reports on COVID-19 and labour migration in the Eastern Partnership countries. Qualitative data collection exercises included consultations with civil society leaders from Working Groups (WG) 2 and 5 of the Eastern Partnership Civil Society Forum (EaP CSF) and experts from think tanks in both the EaP and the EU.

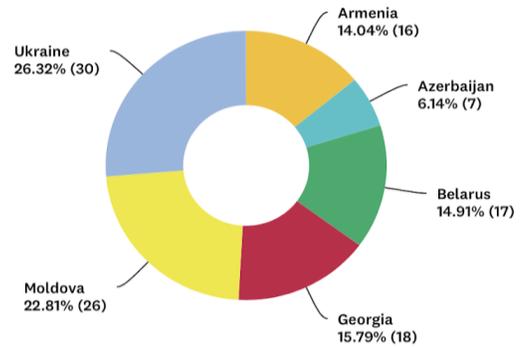
The researcher applied the following methods of qualitative research:

1. Desk review of relevant literature, media articles, available policies
2. Online qualitative survey of key informants (experts, policymakers, CSOs)
3. Focus groups with representatives of WG5 during the EaP CSF Annual Assembly in December 2020, to assist with the evaluation of Deliverables 6 and 17, and to hear perspectives on the current state of reintegrating returning migrants
4. Case studies of returning migrants – 6 semi-structured interviews with respondents to the survey aimed at returning migrants
5. An in-depth interview with a representative of the EU Trade Union Confederation

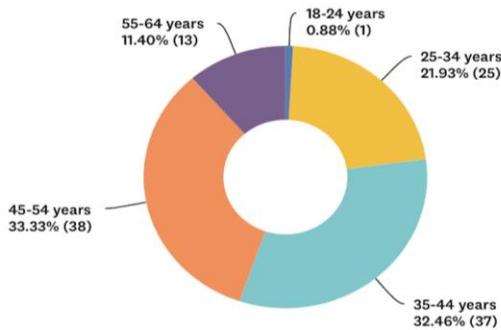
Details of the quantitative research conducted by the author:

The online survey of migrants from EaP countries ran between January 21 and February 17, 2021, and was hosted by Survey Monkey. The survey was designed and distributed in two languages (English and Russian) through targeted Google and Facebook ads. Most of the data collected was in Russian, with individuals providing more details having later been identified and targeted for interviews. The survey remained anonymous, and only those who voluntarily chose to give more details were contacted.

The survey registered 114 respondents, thus portraying the situation of returning migrants on a smaller scale. The highest level of participation was from Ukraine (30), followed by Moldova (26) - *Figure I*.



*Figure I: Origin of respondents*



*Figure II: Age of respondents*

The predominant age range was 45-54 years old (*Figure II*), with most respondents having either completed technical or professional education (33.3%), or not completed secondary education (33.3%). Some 74.5% of the survey respondents did not hold double citizenship with an EU country.

A relatively equal balance was struck between urban (48.25%) and rural (51.75%) respondents, while the gender balance was 64 men and 50 women.

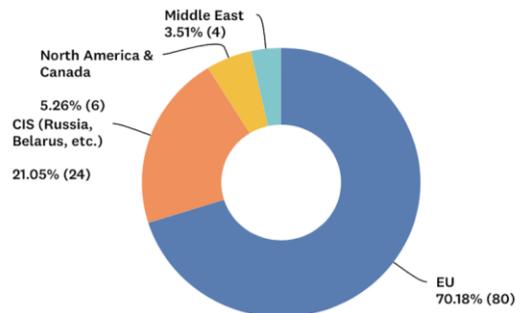
The main destination region of the respondents was the EU (70%), however, some individuals reached by the survey had returned from the CIS countries (21%), North America and Canada (5.26%), and the Middle East (4%).

Open-source data on migration and key economic indicators was procured from UN, IOM and World Bank.

Official information requests were sent to all six national countries. However, this method of data collection was less effective.

### Limitations

Assessing labour migration before the COVID-19 pandemic was, in itself, a challenge due to the limited available data and expertise. That being



*Figure III: Host country of respondents*

said, the performance of the current research in the current conditions had underlined prior limitations and revealed new ones, such as:

- **Lack of up-to-date primary data sources.** Data on migration within the EU and EaP is updated periodically, but not immediately. As such, neither national sources (such as national statistics bodies) nor European platforms (EUROSTAT) were entirely up-to-date at the time of writing.
- **The permanent evolution of the COVID-19 crisis** in the region made it difficult to access accurate data, since figures still required consolidation and were susceptible to changes.
- **Limited expertise was sourced from CSOs.** In seeking expert perspectives on the matter, the author was met with a low level of receptivity, thus limiting the quantity and geographical scope of input received from experts and civil society practitioners.
- **Lack of digital tools for tracking migration flows** within the EaP and EU.
- **Limited responsiveness of government information portals.** In the process of collecting data on border inflows and outflows to and from the EU, official information was requested from the national governments from the EaP countries. However, since the requests were in English and made by a foreign entity (the author's Moldovan CSO), answers were limited (only the Armenian and Moldovan authorities responded).
- **Limited data on informal economic activity.** Due to the reliance on secondary data from sources such as the World Bank, the comprehensiveness of the research was affected by the inevitable omission of figures arising from informality (informal remittances, informal labour, etc.). For instance, the World Bank data set includes only formal transfers and no information on remittances transferred through informal channels. This is quite a severe problem as a considerable part of migrant remittances never enter formal financial institutions (Portes, Guarnizo and Landolt, 1999); Landolt, Autler and Baires, 1999).
- **Incomplete or flawed data on COVID-19.** WHO relies mainly on the data provided by official governments, yet this is limited by factors such as the number of available tests and differing testing strategies, administrative bottlenecks and more. The reported data on COVID-19 in the region could therefore be misleading, or at the least incomplete.

## INTRODUCTION

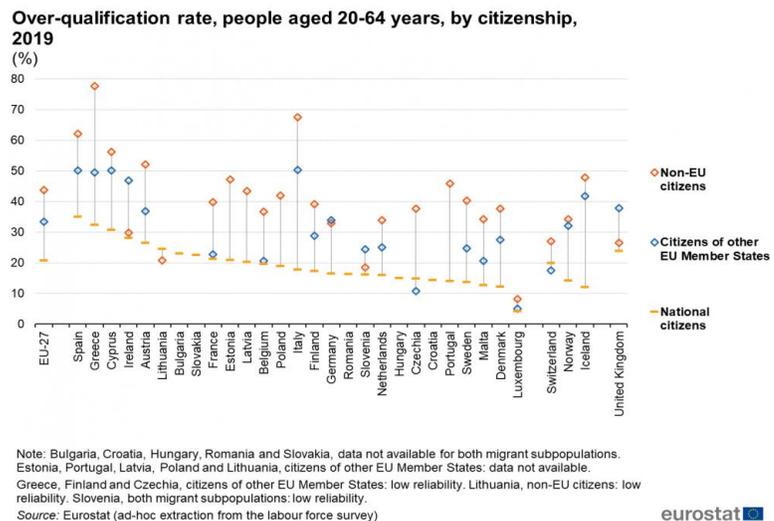
### Labour migration in the EaP context

Overall, labour migration brings both benefits (remittances, reduced unemployment, stimulation of education, benefits from return migration and diaspora) and costs (reduced labour supply, brain drain, negative impacts on public finances) for sending countries.

The migration-development nexus appears to be beneficial and efficient in literature, but how does it translate into policy? In line with the principles of the neo-liberal market economy, the theory states that the labour force migrates to where it is in shortage – i.e. to where the rewards for labour are higher – and that in doing so, so uneven geographical distribution of labour is bound to vanish (Simionescu et al., 2019). However, even if it did work like that in practice, there would be inevitable side effects to manage in the intervening period, until the balance is established.

From the perspective of sending countries, labour migration has two main implications. First, migration serves as an engine for economic growth for the sending country due to remittances. Gibson and McKenzie (2010) found that the typical yearly value of remittance (the money transferred from a Western European to an Eastern European country) is approximately USD 5000. Moreover, earnings received in a foreign country but spent somewhere else raise purchasing power parity (Grenčíková et al., 2018), leading to higher living standards (Rausser et al., 2018). However, the drawback attached to this phenomenon is dependency, as illustrated by the housing sector: emigrated citizens and their families account for a substantial part of the housing industry’s financial turnover (Rausser et al., 2018), since remittances are often used to construct or renovate the family home back in the country of origin. Although positive in the short run, it is equally the case that if emigrant families stopped funding such industries, those sectors would inevitably suffer.

From a macroeconomic perspective, labour migration is largely seen by the sending state as entailing a net loss of skills and expertise – an example of the so-called ‘brain drain’ effect – with the young and the highly qualified being the primary participants in emigration. Indeed, as *Figure 1* demonstrates, in most EU countries, non-EU migrants accounted for a considerable proportion of the respective country’s ‘over-qualification rate’ in 2019. Thus, in addition to a ‘brain drain’, labour migration can also be regarded as a ‘brain waste’, since some less-skilled jobs in the host country are taken by highly educated, over-qualified people arriving from abroad (Hazans, 2013).



*Figure 1: Over-qualification rate within EU countries*  
Source: Eurostat

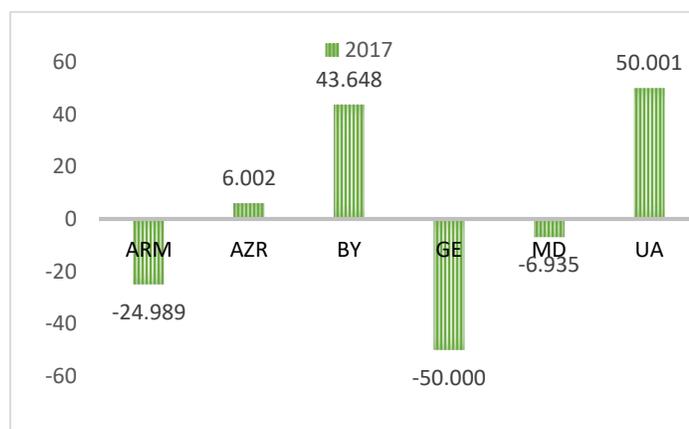
Such ‘leaking’ of knowledge can lead to shortages home, with Western countries leveraging their competitive advantages to receive first-class specialists. However, in the case of Ukraine, Strielkowski and Sanderson (2013) observed the opposite phenomenon: although Ukrainian migrants usually take jobs in the same sector as at home when migrating to the EU’s Central and Eastern European member states, upon their return, their absorbed new abilities and ideas can

boost knowledge transfer in the origin countries, leading to investment, the spreading of new technologies and the launching of new high-end products (Gibson & McKenzie, 2010). Emigrants’ immaterial capital or “social remittances” – their relationships, linguistic competence, problem-solving abilities, and so on – are thus highly valuable intangible resources (Strielkowski et al., 2018). Yet for such a situation to arise, an enabling environment is required first.

Böröcz (2014) analysed the relative share of remittances in the GDP of the countries of the former USSR. He found a rapid growth in which the overall sum in 1999 (~8 per cent) doubled in five years, followed by a stagnation at around 15 per cent until 2010, when it started to increase again (Unctad, 2019). In the Eastern Partnership countries, the total value of remittances in 2019 represented USD 24.17 billion (World Bank, 2019), with Ukraine having the highest stake of USD 15.78 billion (World Bank, 2019). On average, remittances represent 9.21% of GDP across the region. The higher the total value of remittances is, the more dependent and vulnerable the domestic economy is. It is also worth noting that, as some economists argue, remittances can also inflate the domestic currency, push up prices, and eventually fuel further emigration (Cohen, 2005).

A particular fiscal contribution is achieved through emigration, thanks in some part to the spending of remittances within the sending country’s economy. Yet other potential sources of governmental revenue are out of reach through the lack of taxable working hours (Schiffauer & Schiffauer, 2017), with the financial coverage for welfare systems such as pension schemes and health care taking the largest hit, remaining underfunded and unsustainable (Hazans & Philips, 2010; World Bank, 2015). This leads to a vicious circle that marginalises migrants from any health or social protection system at all (in either in the sending or host country). Indeed, such a phenomenon is a self-accumulating process: bad social conditions and inefficient social security systems at home force young talents to seek a livelihood elsewhere; in time, those labour migrants become accustomed to better salaries abroad, meaning that their willingness to work falls dramatically in the event they return home, while many migrants also succeed in collecting enough money to relieve their family from the burden of working for a meagre salary back home (Sokolowicz & Lishchynskyy, 2018), thus potentially having an impact on economic output in the country of origin if this phenomenon is observed in large enough numbers.

Due to chronic economic divergence with the EU, the Eastern Partnership countries face various forms of migration issues. Out of the six EaP countries, three of them (Armenia, Georgia, and Moldova) are currently experiencing negative net migration (*Figure 2*) – a burden that has a clear effect on human capital development targets.



*Figure 2: Net migration rate (World Bank, 2017)*  
Source: World Bank, World Development Indicators

Previous studies (IZA, 2013) of the region indicate that the main benefits of migration are grouped as follows:

Individual/household benefits	Macroeconomic benefits
<b>Poverty reduction – The extra income due to migration and remittances reduces poverty in remittance-receiving households throughout the Eastern Partnership countries, leading to better nutrition, housing, and access to education and health care.</b>	Greater productivity – Migration plays an essential role in EaP countries in facilitating economic restructuring, whereby “old” jobs are eliminated, and surplus labour is reduced, allowing for greater productivity among those workers remaining in the country. This consequently results in higher wages over time.
<b>Skill gain</b>	Financial sector development in EaP
<b>Changes in values and political outlook</b>	Higher wages in EaP

Similarly, the same studies set out a number of costs associated with labour migration from a given country:

Individual/household costs	Macroeconomic costs
<b>Skill loss (deskilling)</b>	Brain drain
<b>New caregiving arrangements: children and the elderly left behind</b>	Fiscal effects on the social security systems
<b>High level of dependency on remittances for financial stability</b>	

Another aspect identified is illustrated by Italy’s case, where EaP migrants displace those workers from less advantaged regions of the country who are ready to move internally. This creates a double advantage for the workers in the more developed areas, since migrant workers complement labour and capital and help to sustain and improve the region’s affluence. Simultaneously, it produces a double disadvantage for the less developed regions, where locals who are willing to relocate in search of employment, as they had done in the past, find themselves with fewer opportunities due to migrant labour assuming some of those roles. The presence of available labour in the more developed regions also disincentives capital in the less developed ones, which creates the second disadvantage.

At the same time, the costs of migration are not significant for European host countries since migrants from the EaP are not competitive with the workers looking for jobs in the area where they work; rather they complement them. Moreover, the cost of migrants for social security systems is minimal when considering the high level of informality of un-skilled labour. Staying with the example of Italy, it is arguable that labour migrants are net contributors to the Italian social security system due to migrant care workers’ value as a “resource” for Italian welfare, providing continuous and personalised assistance with a relatively small cost to Italian taxpayers. In fact, the Ministry of Labour has estimated that the Italian state is saving six billion Euro annually, thanks to the work of migrants in the health sector. In Poland’s case – where temporary

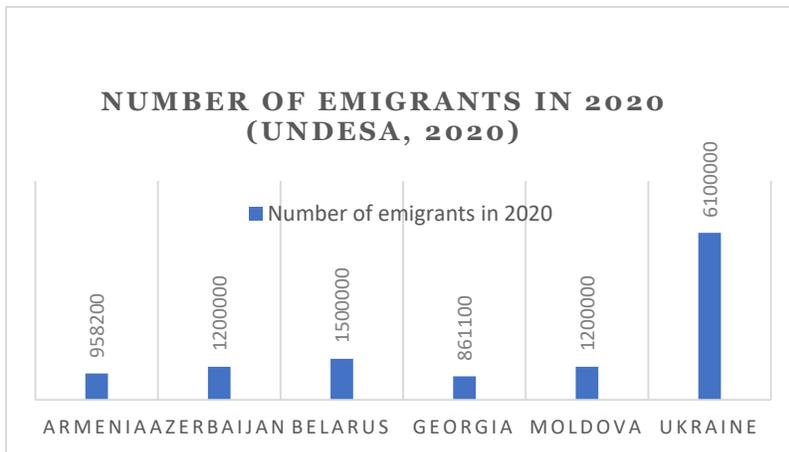


Figure 3: Number of emigrants from EaP countries (UN DESA, 2020)

Source: Migration Data Portal

country, since many are relatively young and therefore do not draw contributory benefits such as pensions, while the recourse of older women working as caregivers to the host country's welfare system is balanced by the fact that they rarely have children with them.

Before the disruptions to migration flows caused by the COVID-19 pandemic in 2020, the number of international migrants from the EaP region had multiplied over the previous two decades. Although Russia was initially the destination of choice for most labour migrants from the Eastern Partnership countries, within the last decade a discernible shift towards the European Union has been observed (CASE, 2013), contributing to Europe's status as the continent with the most significant number of international migrants in 2020: 87 million. (ILO; 2020). Currently, the number of emigrants from EaP exceeds ten million (*Figure 3*) – a figure that could be at least 2% higher, when taking into account dual citizenship and informal migration.

## COVID-19 in the EaP region

This paper looks at some of the most significant consequences of the COVID-19 pandemic on migration and mobility within and from the Eastern Partnership region. Notably, the document discusses the evolution of labour migration, growing patterns of irregular migration, the impact on migrants' individual situations, the potential for re-integration, and possible scenarios for migration post-crisis.

The EaP countries reported their first COVID-19 cases in late February and early March 2020, shortly after the virus spread to the EU. In time, and line with the global trend, the number of officially reported new cases for the EaP region as a whole increased sharply to reach a first peak towards the end of June. By the summer of 2020 the evolution of the disease had slowed, however, the last months of the year were marked by high numbers of infections in all six EaP countries – especially in Ukraine (*Figure 4*).

labour migrants work quasi-legally, due to the Polska Karta – Ukrainian labourers account for a considerable and unambiguous share of the fiscal contribution of Poland's migrant workers, further demonstrating the material benefits that EU member states can draw from migrants from the EaP countries.

The same IZA papers illustrate that EaP migrants use public welfare and social services less than nationals of the host

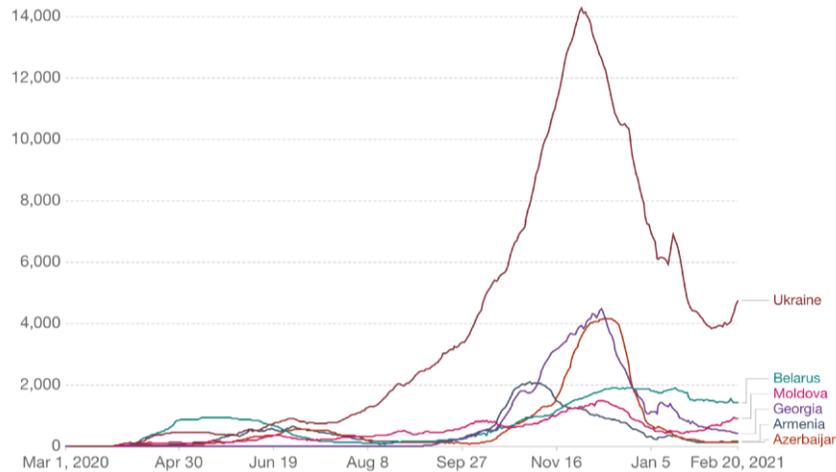


Figure 4: COVID-19 Outbreak in the Eastern Partnership - Daily new confirmed COVID-19 cases  
Source: Our World in Data

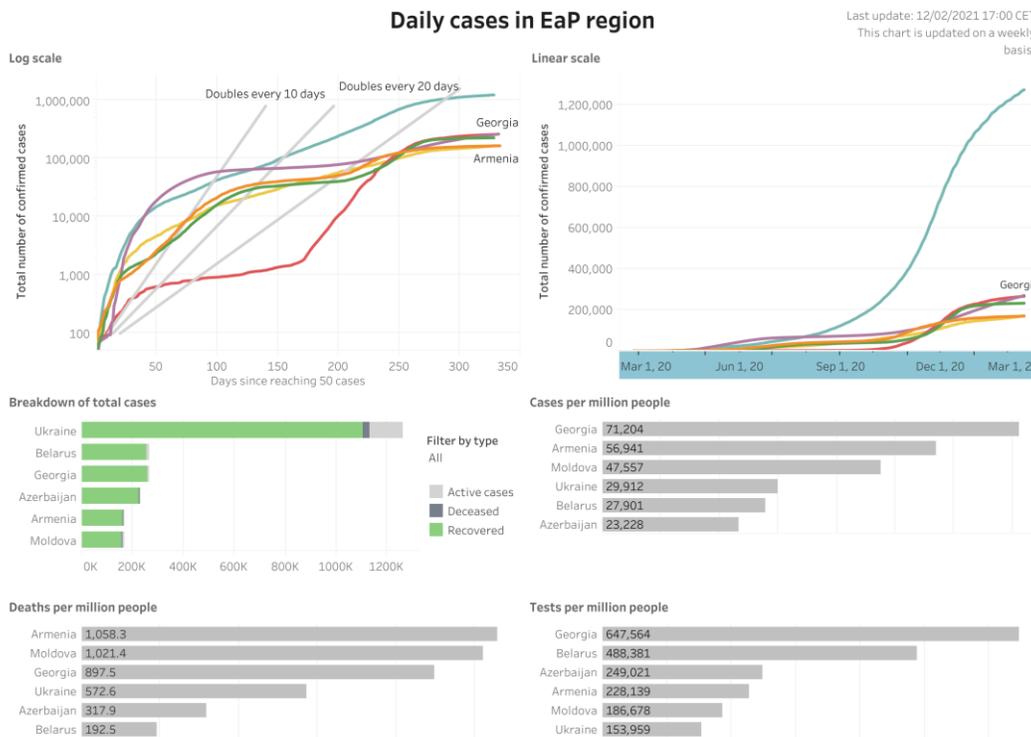


Figure 5: Number of daily cases from EaP countries  
Source: Eastern Partnership Civil Society Forum

The beginning of 2021 found the region battling a growing number of cases and deaths, with Ukraine registering the EaP’s highest total number of deaths due to COVID-19 (24 174), followed by Moldova (3 626 deaths). In addition to these sombre figures, twelve months into the current crisis, testing capabilities – crucial to identifying positive cases and to facilitating an agile health policy response – have been ramped up considerably, with Georgia having carried out 647 564 tests per million people and Belarus, 488 391 per million people (Figure 5). While it has already been indicated that all COVID-19 related data is inevitably incomplete, it should be noted that

data from Azerbaijan and Belarus may be misleading or false due to government obstruction of reliable information flows.

Faced with health risks and a decline in income, both migrants and local labour forces have had to adapt, outsource savings and seek other solutions to their current difficulties, while the disruption to national economies in the Eastern Partnership region and host countries showcased the complexity of developing effective policy responses. More than simply a health crisis, this paper will address the COVID-19 pandemic from a human capital development perspective, seeking to extract the economic and social implications on labour migration. Currently (February 2021), all EaP countries except Belarus are under a state of emergency or equivalent extraordinary regime, while international travel, though permitted, is subjected to testing and quarantine conditionalities. For example, Georgia requires isolation on arrival, and a negative COVID-19 test performed in the last 72 hours. Where evidence of full vaccination (two doses) can be produced, such conditionalities are eliminated (US Embassy Georgia, 2021).

## 1. UNFOLDING THE COVID-19 “SNOWBALL”

*This section is designed to develop an analytical framework for the paper and investigate the context – including current and foreseeable regional trends – in the economies and labour markets of the Eastern Partnership. This component offers a structural analysis of **migration patterns and flows (EU and non-EU) and an overview of the EaP migrant workers most severely affected by the COVID-19 outbreak.***

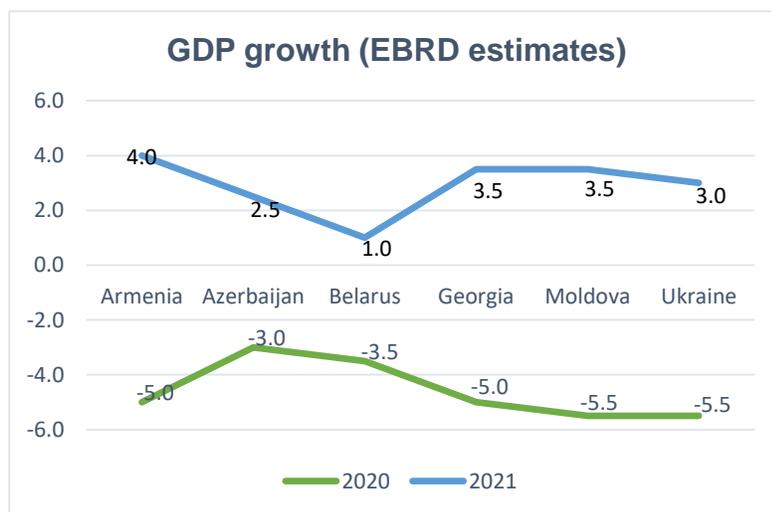


Figure 6: GDP growth rates in 2020 and 2021 estimates  
Source: EBRD

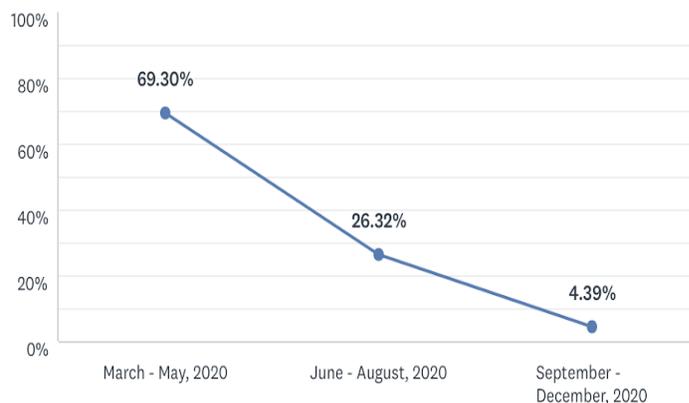
The effect of COVID-19 on the economic development of the Eastern Partnership countries has been profound. Estimates indicate an average 4.5% decline in GDP (Figure 6) while decreased productivity, low mobility and the health crisis will ultimately lead to a slow recovery in 2021 – as already reflected by a higher level of unemployment.

The most aggressive period of the crisis was registered in the spring of 2020. It was during this time that approximately 69.3% of the year’s returning migrants went

back to their home country (Figure 7). Constrained by decreases in – or the total shutdown of – their employment, rising costs of living, and worsening health security, it is believed that a third of the Eastern Partnership region’s emigrants returned home over the course of 2020 (World Bank, 2020).

Further studies (EBRD, 2020; UNDP, 2020) show that although the workers of EaP origin most severely affected by COVID-19 were those with no qualifications or social guarantees, all categories of labour migrants from the EaP – and their households – were affected economically and socially, and found themselves with limited prospects.

In the process of unfolding the impact of the COVID-19 on labour migration, we must consider the bigger picture of COVID-19's broader effects on the economy. As *Figure 8* demonstrates, global supply shocks resulted in decreasing sales to consumers, while lockdowns created liquidity problems for companies (at home and abroad), forcing them to implement measures such as labour lay-offs, reduced working hours, reduced wages or a combination of these. These actions



*Figure 7: When did you return to your home country during the COVID-19 pandemic?*

reduced the disposable income of the population. The longer containment measures persist, the longer income reductions for households will also likely continue, potentially causing a more dramatic contraction of consumer expenditures in the long run. Decreases in remittances from migrant workers and restrictions on international tourism in the region are also ongoing and will continue to impact consumption patterns.

Firms' reduced turnover and decreases in personal income have caused an overall decline in tax revenues for governments, whilst public expenditure has increased significantly and rapidly due to the introduction of support measures to households and businesses. In the long run, this will lead to a high budget deficit and rising external debt. Moreover, the financial difficulties that households and firms face will lead to problems in loan repayments and reductions in savings. In the long term, the debt-to-GDP ratio may lead to a worsening of loan portfolios (including the risk of a dramatic increase in non-performing loans) and the deterioration of financial stability in the countries from the EaP – all at a time when external supply shocks and restrictions on movement between countries worldwide is directly affecting the international trade of goods and services and the movement of labour migrants.

A vicious circle has thus formed, where businesses have reduced wages or labour forces because of financial difficulties, leading to a loss of consumers' purchasing power which has in turn engendered a demand shock that will worsen companies' financial situation further. In this context, it is possible to conceive of a mid- to long-term effect on countries' financial and macroeconomic stability, leading to an unprecedented economic depression.

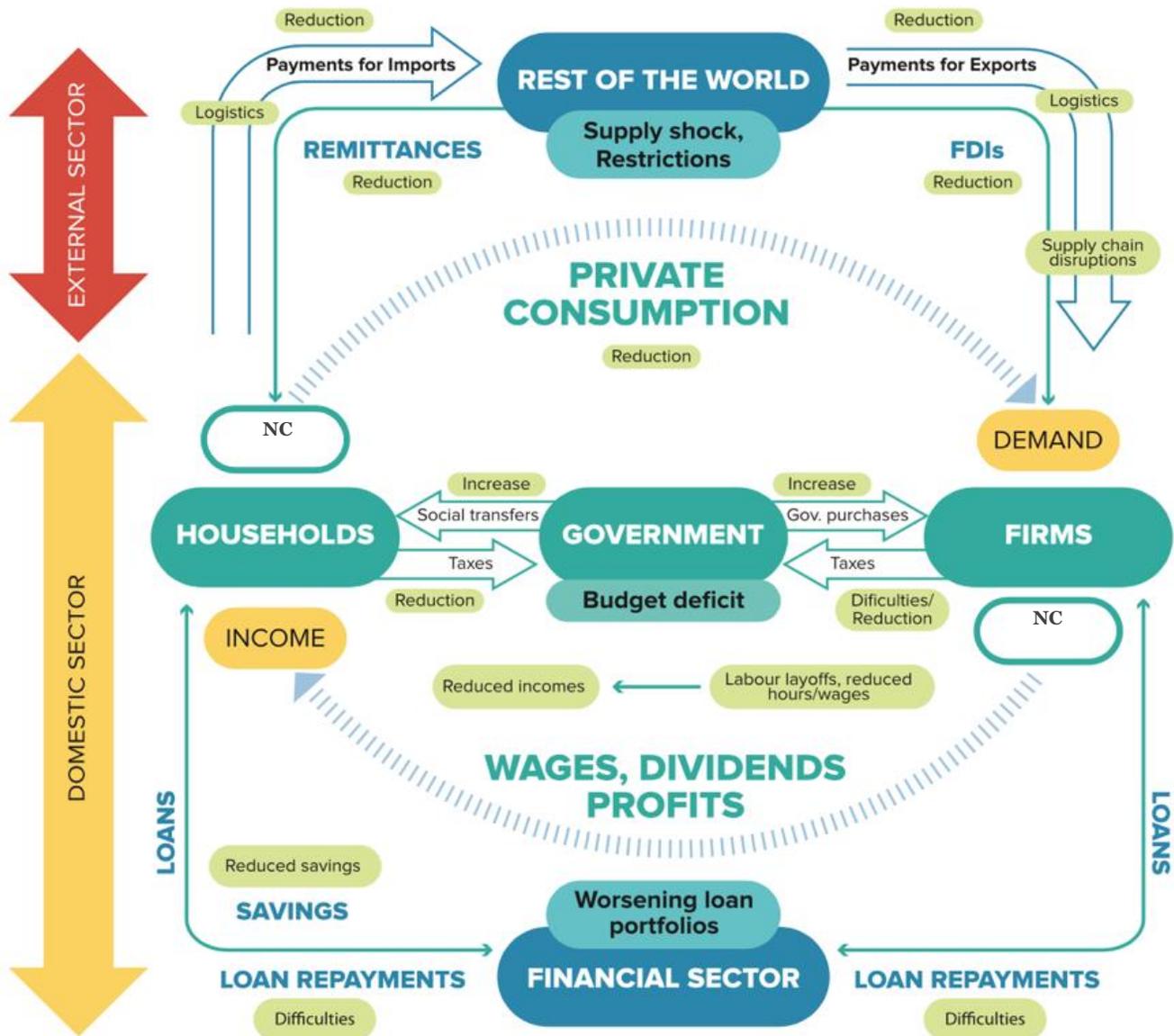


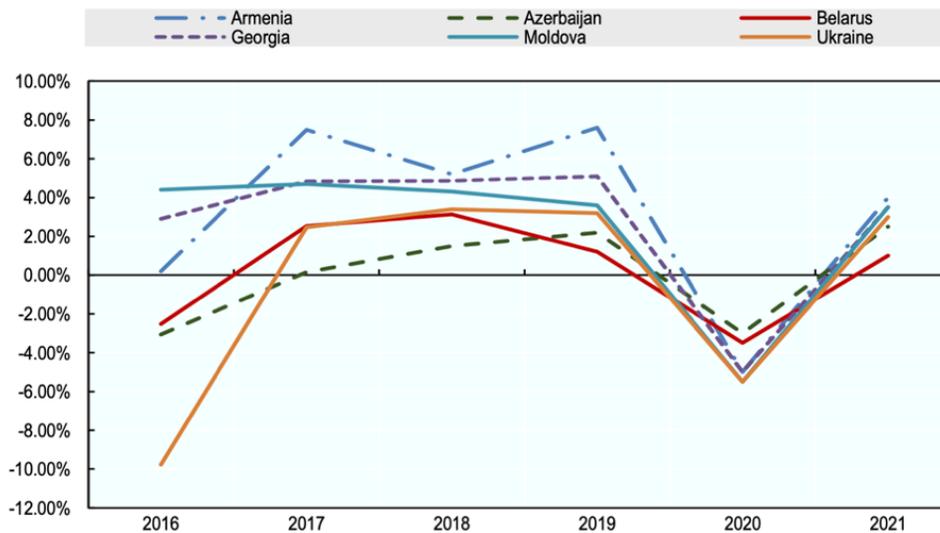
Figure 8: The immediate impact of COVID-19 on revenue circulation in a national economy  
Source: UN

### 1.1 DECREASING REMITTANCES

For most countries where monthly or quarterly data on remittances are available, a typical intra-year pattern is observable in 2020: a sharp decline in April and May (the initial crisis months marked by abrupt, pervasive, and chaotic lockdowns, travel bans, and disruption to remittance services) followed by a slow but *partial* recovery, which was in turn succeeded by higher uncertainty in the late months of autumn, when the majority of EaP countries enacted stricter rules.

The COVID-19 crisis caused a sharp economic downturn across the region in 2020. Closed borders disrupted trade and tourism flows and prevented many seasonal workers, especially in the agricultural sector, from going abroad for work. The economic impact in the second quarter of 2020 surpassed the severity of the Global Financial Crisis of 2008/09. According to EBRD estimates (*Figure 9*), output fell by approximately 4.5% in the EaP region in 2020. In Armenia, Georgia, Moldova and Ukraine, output is expected to have decreased by 5 to 5.5%, while in Azerbaijan and Belarus, the downturn is expected to have been less dramatic, at between 3 and 3.5%. However deep the contraction, the recovery will be lengthy: the EBRD estimates that it will take until 2022 for the region’s GDP to recover to pre-crisis levels, and in Azerbaijan, the recovery could take up to 2025 (EBRD, 2020).

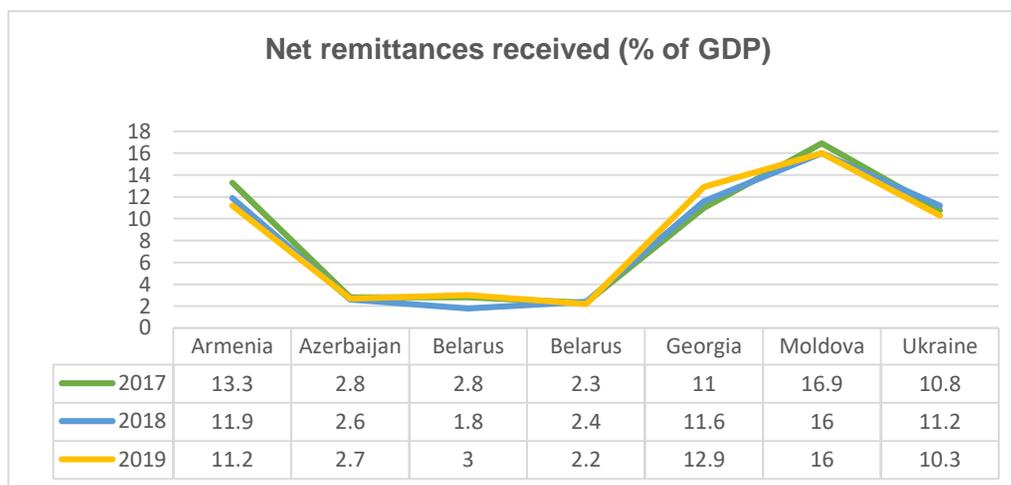
Global remittance outflows were expected to fall by 20% in 2020 (OECD, 2020b). Remittances, an essential component of the balance of payments for several countries, fell sharply during the early months of the pandemic, though some recovery has taken place since then. Lower commodity prices have caused additional problems for exporters of hydrocarbons and metals – Azerbaijan, Ukraine and Armenia – and the collapse in tourism has badly affected Georgia. Nonetheless, positive GDP growth is expected in 2021, averaging 2.5 per cent at the regional level (EBRD, 2020).



*Figure 9: Gross Domestic Product Change Year-on-Year*  
Source: EBRD Regional Economic Prospects 2020

Interruptions to cross-border financial flows related to the current pandemic have hit migrants and their families particularly hard. Labour migrants often have limited safety nets due to being in informal employment, being engaged in jobs that cannot be done remotely, and being excluded from government support measures to mitigate the impact of job losses. This can result in little to no income for migrant workers affected by the crisis, with many facing unemployment or reduced income, and being stranded in their host countries with little or no support. Consequently, they are often unable to support their families at home.

Domestic demand and investment in Armenia, Georgia, Moldova and Ukraine are significantly supported by personal remittances from abroad, which account for more than 10% of GDP (OECD, 2020b). The economic contraction in the EU, Russia and the USA has resulted in increased unemployment in these economies, which led to a surge in returning migrants and reduced inflows of personal remittances to the EaP region. The drop in remittances in the last two years (*Figure 10*) as well as falls in personal incomes resulted in lower tax revenues, including diminished VAT receipts due to lower consumption. This is significant, since VAT accounts for 33% of all tax revenues in Armenia, 19% in Azerbaijan, 29% in Belarus, 42% in Georgia, 51% in Moldova, and 41% in Ukraine (OECD, 2020b). As observed before the crisis (in 2019), there was already a decrease in remittances across the region, while in April 2020, remittance outflows from Russia dropped by over 60% - although these quickly rebounded in May, returning to pre-crisis levels, but remaining roughly 20% lower year-on-year.



*Figure 10: Net remittances received in EaP countries*  
*Source: EBRD Regional Economic Prospects (2020)*

Estimates indicate a decrease of 20% in remittance inflows to low- and middle-income countries across the world in 2020, entailing inevitable effects on internal consumption and household financial resilience. In Moldova, a 20% decrease in remittances was observed, while in Ukraine – the region’s largest recipient of remittances – a total remittances of USD 14 billion represented a fall of around 13% compared to 2019. In Azerbaijan remittances fell by 10% in early 2020, with Georgia, Armenia and Belarus recording the greatest remittance downturns – 25%, 30% and 40% reductions, respectively. However, these figures are for quarter two of 2020 – the latest available data. A period of slow recovery in remittance receipts was observed in the remaining six months of 2020, but no data is yet available to measure the extent of that recovery.

## 1.2 THE IMPACT OF REMITTANCES ON HOUSEHOLD INCOMES

Migrants’ families in their home countries depend on incoming remittances for necessities such as purchasing food and paying for housing, education and healthcare. Without remittances, families face the risks and acute consequences of not being able to afford these basic needs.

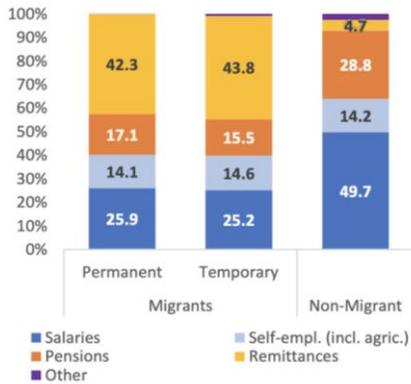


Figure 11: Level of migrants' contribution to their households' budget in Armenia  
Source: World Bank, 2019

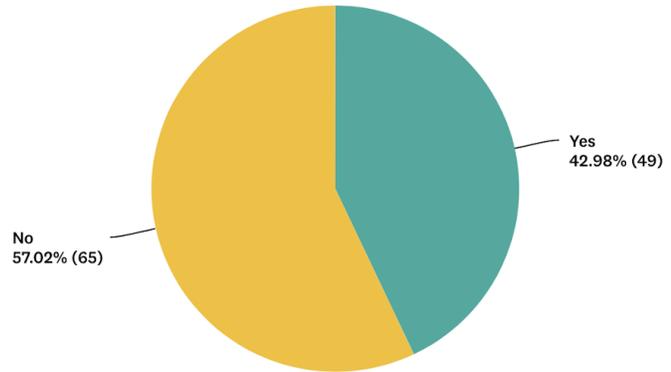


Figure 12: Does your household have debt (loans or mortgage)?  
Source: Author's online questionnaire

Remittances have a significant positive impact on the budgets of households. While the percentage has decreased from the all-time high of 34.6% in 2006, the structural importance of remittances flows remains, with the IOM estimating that in the absence of money received from those working abroad, approximately 100 000 Moldovan households would fall into poverty (IOM, 2020). For the households of migrant workers from Ukraine, remittances accounted for an average of 50-60% of their budget, and thus represented the primary source of income (UNDP, 2020). In Armenia's case, the proportion of household income assured by remittances reached an average of 43% in 2017 (Figure 11).

In Georgia, approximately 100 000 households depend on remittances (Labadze & Tukhashvili, 2013), while in Azerbaijan, 14% of households have a similar dependency (Paul, 2018). Compared to the GDP share of remittances in the EaP region, official remittances in Azerbaijan played only a minor role for the country, such negative net flows being seen as an advantage by the World Bank.

High rates of dependency on remittances among vulnerable populations in the EaP region have generated a wave of anxiety in the context of the COVID-19 pandemic. The financial burden placed on migrants is demonstrated by high propensity to take on loans and debt. For instance, 42.98% of respondents to this author's survey said they have debts (Figure 12). Such a situation leaves room for low-skilled workers to be in a much more vulnerable position due to their temporary and uncertain economic conditions. In the case of Moldova, a quarter of households (237 000 households) receive remittances, and for half (118 000) of these households, remittances constitute more than 50% of disposable income. Indeed, some 23.4% of households (30.5% in rural areas) would be placed below the poverty line if they did not receive remittances (UNDP, 2020b). The author's survey shows that 17% of Moldovan migrants had already stopped remitting in 2020; if replicated across the entire population, this would mean around 37 500 Moldovan households falling under the poverty line (ibid.).

In Armenia, poverty and vulnerability in rural areas are increasing drastic, due to the COVID-19 crisis (UN, 2020). The majority of households expect to have problems keeping up with basic

expenses and paying for utilities if the pandemic continues and the economic situation worsens. The case is alarming for the most vulnerable groups. Some 73.7% of women and 68.4% of men think that it will be challenging to pay for utilities amid the pandemic (ibid.). Data provided to this author by the Statistical Committee of the Republic of Armenia indicates that almost 250 000 people in Armenia rely on remittances sent by family members working abroad, and income from circular or seasonal migration frequently forms the basis of livelihood strategies, with around 98% of remittances are spent on routine consumption expenses.

In Ukraine, almost 300 000 returning migrants are at risk of poverty due to their limited financial gains (UN, 2020). Some 18 to 21 million people are already living below the poverty line, an increase of 6 to 9 million due to COVID-19, with households with more than three children or children under three especially vulnerable. These are the working poor, who have little to no access to savings, and for whom unemployment benefits are limited or inaccessible in many cases due to informal work. Indeed, with limited social assistance coverage, they lack access to medicines, PPE, and healthcare in general. This is particularly the case for undocumented migrants, who cannot afford informal payments to healthcare practitioners or pharmacies.

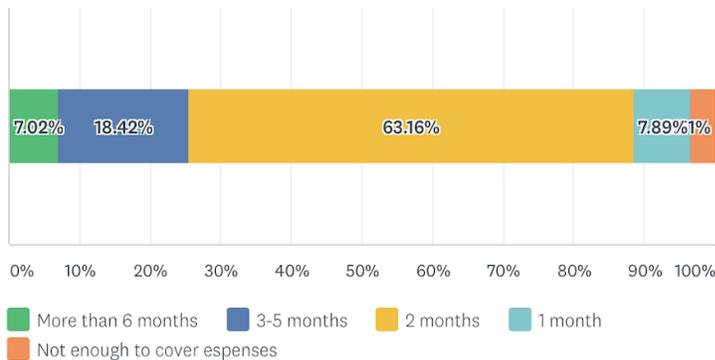


Figure 13: For how long did your personal income/savings from abroad cover bills at home?  
Source: Author's online questionnaire

Returning migrants have been hard pressed to cover any bills at all for any extended period, with 63.16% of respondents to the author's survey having declared that their income was only sufficient for an average of 2 months (Figure 13). This is explained to a great extent by the low average salaries gained abroad: ranging between 1000 and 1999 EUR (Figure 14), this is an insufficient income to balance between the cost of living in more developed host countries and supporting a family back home.

The above observations raise even more concerns in light of the trend identified by previous studies, whereby the members of a migrant worker's household back home have a lower propensity to seek their own employment: with such a scarcity of alternative financial resources, returning migrants remain a vulnerable category of the population, responsible not only for their personal survival, but also for that of their households.

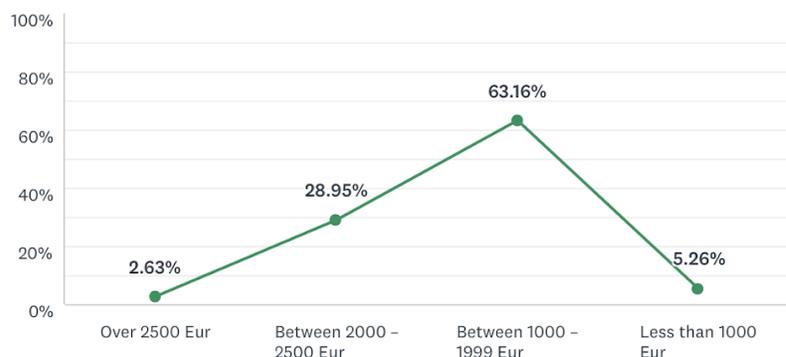


Figure 15: What was your average salary abroad?  
Source: Author's online questionnaire

Another, more technical, issue revealed within in-depth interviews is the high costs of and limited access to remittance channels. In both the host and home countries, remittance service providers have had to close or reduce their service hours, while mobility restrictions and limited public transportation have made it difficult for people to reach branches and cash-in/out agents. These access restrictions are critical challenges to the ability of many migrants and their families to send and receive remittances, particularly in a context of limited awareness and adoption of alternative digital transfer channels. As Elena (47), a migrant returning from Italy told the author during an interview, *“There were weeks when I was afraid that my transfers would not reach my family (two sons pursuing their studies, and my husband), putting them at high risk of remaining without food.”* Although drastic measures were initiated by governments, no alternatives were given by the authorities for digital money transfers or any other means of ensuring remittance services. In this situation, where even informal channels of money transfers were not available, micro-loans at home were often the only way for survival.

### 1.3 THE IMPACT OF COVID-19 ON THE EaP LABOUR MARKET

The COVID-19 crisis has impacted the labour market in multiple dimensions, including labour migration flows in essential sectors of the European economies where EaP labour migrants were settled. According to an analysis by the IZA Institute of Labour Economics (Fasani & Mazza, 2020), in the EU, migrants account for the 13% of the workers that are deemed ‘essential’ to keeping the economy running. One essential sector strongly impacted by the COVID-19 crisis is agriculture, where mobility restrictions cut off workers’ seasonal inflows, curbing the sector’s productivity due to the inability of local workforces to fully replace third-country national seasonal workers. This was particularly the case in countries such as Italy and Spain, where migrant agricultural workers play a crucial role (Kalantaryan, 2020). Beyond agriculture, non-EU migrant workers are over-represented in almost all essential but low-skilled professions (e.g. personal care workers in health service, drivers, transport and storage labourers, food processing workers), constituting up to a third of the total labour force in roles such as including cleaners, home helpers, and labourers in mining and construction. In light of this fact, the COVID-19 crisis has brought a new emphasis to the relevance of the role played by a significant share of migrants performing low-skilled occupations within EU societies and their economies, especially during periods of forced closure.

However, beyond the impact of migrant workers on EU labour markets, the return of migrants to their home countries has also put in focus the EaP labour markets. Labour migration reduces the labour supply and hence potential output. In a region where emigrant labourers amount to approximately 11 819 300 people (see Annexes), the insufficiency of labour supply caused by that considerable withdrawal of potential workers is expected to worsen in the coming years, exacerbated by low fertility levels and high mortality among working-age people. Assuming labour force participation rates remain constant, the total labour force is projected to shrink in the region: for instance, the total population of Ukraine is expected to shrink by 2.8 million by 2030 (UNDESA, 2019).

Prior to the crisis, unemployment rates in the EaP countries saw slow fluctuations, with Armenia holding the highest rate in the region in 2019 (*Figure 15*). According to the Central Bank of Armenia’s forecast, the unemployment rate was set to reach 20.2% by the end of 2020.

The combination of widespread informality in the labour market (*Figure 16*), high unemployment, low savings rates and heavy reliance on remittances in the EaP region points to the vulnerability of large segments of society to a prolonged economic downturn. Millions of people are likely to experience the risk of poverty in EaP countries because of the COVID-19 crisis. For example, according to a study carried by the Institute of Demographics and Social Research in Ukraine, which defines the actual minimum subsistence level in 2020 to be USD 115 to 130 per month (which is higher than the legally prescribed minimum subsistence level of USD 75), the share of population living below the subsistence level was expected to be 32% in 2020. Instead, it is likely to rise to 45% due to the COVID-19 pandemic (Kossov, 2020). The combined effects of the economic and public health crises are thus reversing years of progress in poverty reduction and improving living standards.

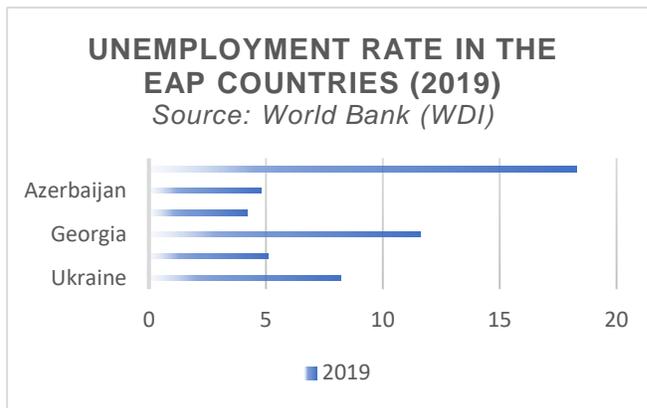


Figure 15: Unemployment rate in the EaP countries  
Source: World Bank

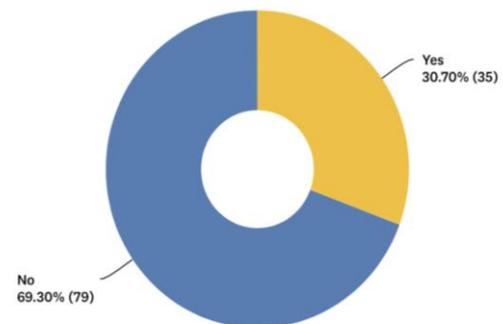


Figure 16: Were you working on the basis of a legal contract?  
Source: Author’s online questionnaire

Once they return home, former labour migrants find themselves in a precarious and highly uncertain position – particularly if employed in lower-skilled sectors that are affected by informality both at home and abroad, such as construction (23.68% of returning migrants

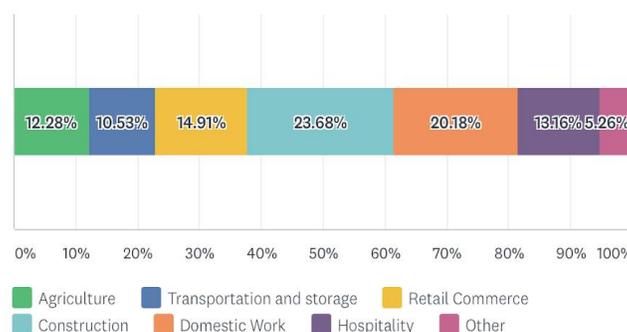
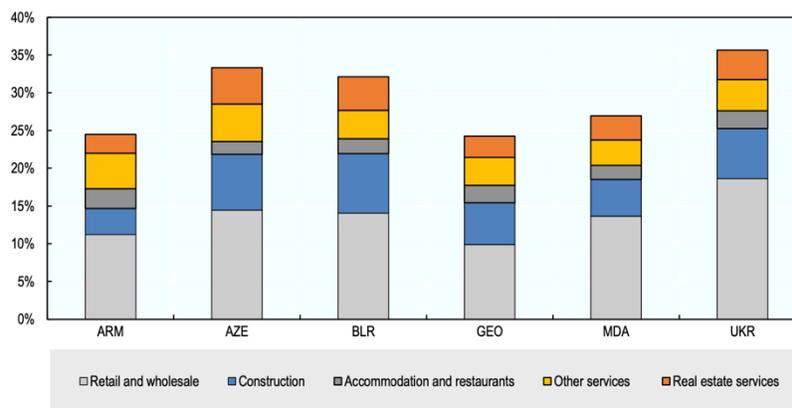


Figure 17: In what sectors of the economy were you working in your host country?  
Source: Author’s online questionnaire

responding to the author’s online questionnaire), domestic work (20.8%), and agriculture (12.28%) (*Figure 17*).

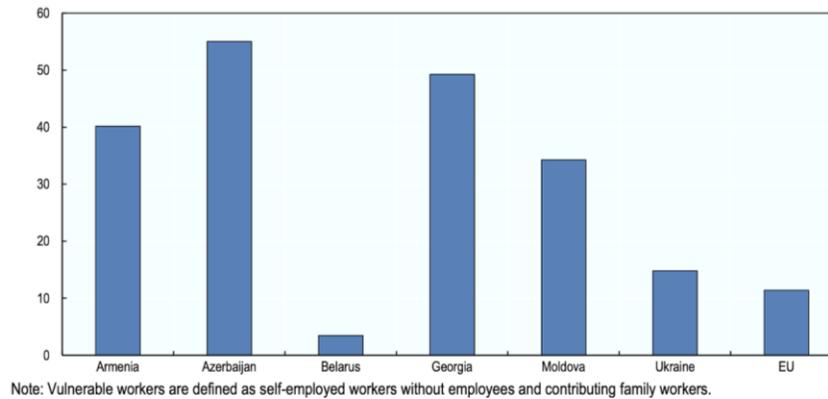
Over a quarter of workers from EaP countries are employed in the sectors most affected by lockdown measures, such as retail and wholesale, and construction (*Figure 18*). However, the effect on employment in retail was, to a certain extent, mitigated by the decision to allow grocery stores and pharmacies to remain open. Overall, low-skilled workers – ranging from 6.8% of the working population in Georgia to 19.1% in Ukraine (OECD, 2020b) – were the most affected by containment measures because remote working was rarely an option (*ibid.*), and therefore closure of the workplace meant suspension of work. Notwithstanding government wage support schemes, the effect of confinement measures could therefore have been, *inter alia*, a regression in income distribution.



*Figure 18: Employment in sectors most affected by containment measures (% of total employment in 2018)*  
Source: OECD, 2020b

The prevalence of informal economic activity among labour migrants can be said to have exacerbated the socio-economic impact of the crisis and complicated efforts to mitigate such effects. Armenia, Georgia and Moldova have comparatively large informal sectors, with the IMF estimating the size of the informal economies in the EaP region to range from around 30% of GDP in Belarus to 50% of GDP in Georgia, and the International Labour Organisation positing that informal work exceeds 20% of all employment across the region, rising above 50% in Armenia (OECD, 2020b).

Based on the available data, the most vulnerable workers (defined by the OECD as “self-employed workers without employees or contributing family workers”) – who are, by extension, those likely to have been most adversely affected by virus containment measures – represent between 4 and 57% of workers in the EaP countries. In comparison, the average in the EU is 10% (*Figure 20*). Faced with little or no available work, potentially for a number of months to come while the pandemic persists, these individuals and their families may well ‘slip through the net’, given that the social welfare systems of the region are unlikely to have the capacity to cover unemployment benefits over a sustained period. In such a situation, it is reasonable – though regrettable – to expect that the prevalence of informal labour, and the precarity that comes with it, may increase.



*Figure 19: Vulnerable workers as a percentage of the total labour force in the EaP countries and the EU*  
Source: OECD, 2020

#### 1.4 SOCIAL AND HEALTHCARE (UN)COVERAGE

Migrants may also be disproportionately impacted by COVID-19 and related health concerns due to the high number of labour migrants working in sectors with greater COVID-19 exposure. Migrants are, for example, more likely to hold temporary contracts and tend to be concentrated in industries more affected by the pandemic and its economic consequences (IOM, 2020). Moreover, many labour migrants in the EU lack any negotiation power with their employers since they work informally and ignore any form of social organisation such as trade unions (*Figure 20*). As confirmed by the author's interview with a representative of the European Trade Union Confederation (EUTC) representative, the participation rate of labour immigrants in trade unions across the EU is minimal, particularly in Poland. On the other hand, there is no disaggregated data based on ethnicity or citizenship that can reveal a complete picture of the formally organised labour migrants.

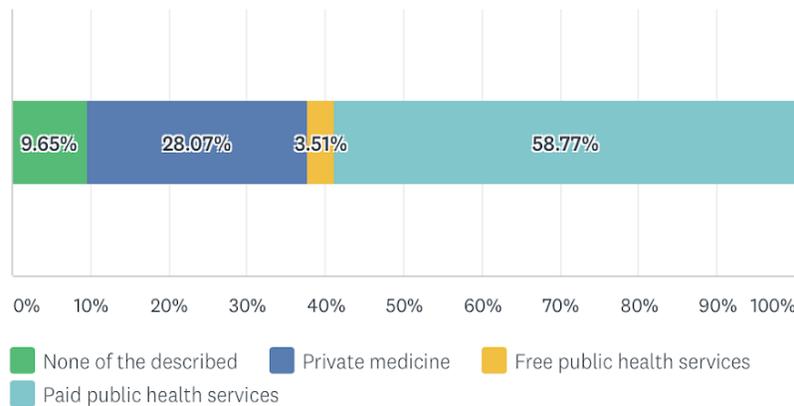
***Figure 20: Case study - Azerbaijan labour migrants in Poland***

Source: OC Media, 2020

"Few migrants in Poland see any appeal in joining a trade union or immigrant advocacy organisation, which could help them fight to improve their pay and working conditions, says Agata Zuraw of the European Migration Network. Workers fear demanding the legal rights they are entitled to will lead to legal problems, as work permits are tied to particular employers. 'Migrants in Poland don't care about their legal rights. They only think about money,' says Elshan (not his real name), a middleman in Poland who organises contracts for Azerbaijani migrants. He says around 100 migrants came to him seeking work last year. He takes a cut of contracts successfully signed with factories and construction firms."

There is limited access to formal work, healthcare and protection due to the lack of support networks, and documents. As a result, medicines and PPE remain unaffordable or inaccessible, which increases exposure to the worst effects of the crisis, and raises the risk of exploitation. For

instance, 58.77% of returning migrants responding to the author’s survey indicated that they had paid for public health services (*Figure 21*) – one of the follow-up interviews (with Nicolai, 55) clarified that many of these represented not official payments, but rather bribes. Since possibilities to remain covered by public health insurance from abroad are limited, over a quarter of respondents (28.07%) turned to private healthcare providers, which are increasingly present in the region (with Georgia holding the highest number of private institutions).



*Figure 21: What means have you used for medical services in your home country?*

*Source: Author’s online questionnaire*

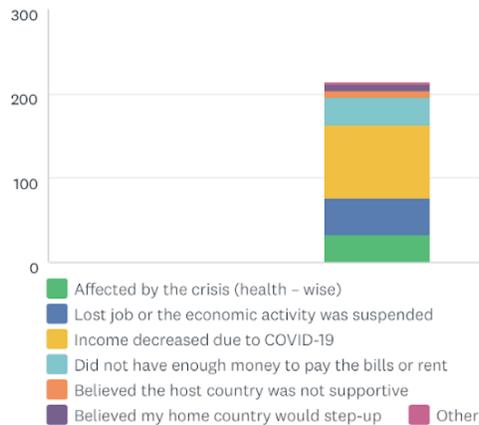
A very high share of migrants (78.2%) have reported not being covered by health insurance currently (UNDP, 2020b). While returning migrants have a younger and healthier profile on average, this form of deprivation may restrict access to health providers and amplify unmet health needs. Moreover, this topic raises concern about migrants who could not return to their home countries.

**Figure 22: Returning migrants**

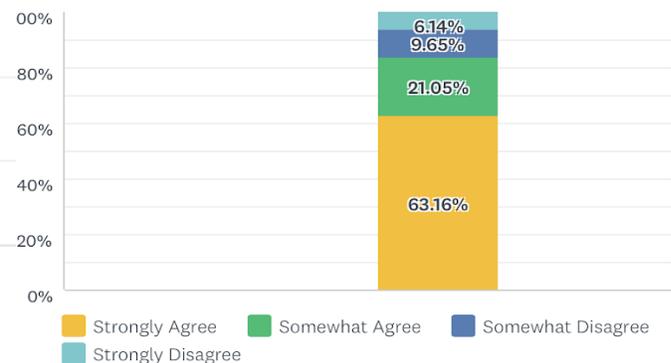
“Many people will say that this pandemic united their family and allowed them to enjoy each other more; however, in my case, it made me ill. I am all by myself with two small children, as my husband works abroad. I have no parents or other relatives close by. Since the pandemic started, I have begun to have heart problems, high blood pressure, hormonal problems and weak nerves. The children, especially the 3-year-old, are hysterical due to a lack of human interaction and fresh air. All our life plans have been derailed: my husband cannot return home, which stresses me even more. I cannot imagine how other single mothers with 3 or 4 children get by.” – Female respondent aged 26-35

For those legally resident in their host countries, health care is accessible, based on their region and public health offers. However, those in the most precarious situations can be forced to choose between risking their life and meeting financial ruin if their health requires intervention. In this context, the author’s survey found that health concerns were one of the main motivations for the

return of migrants to their country of origin, alongside a belief that their home country would step-up and provide for them (*Figure 23*).



*Figure 23: What were your reasons for leaving the host country?*  
Source: Author’s online questionnaire



*Figure 24: Have you felt discriminated since returning home due to the belief that you represent a health risk?*  
Source: Author’s online questionnaire

Upon returning, migrants have invariably been met with mixed feelings, given the strong fear factor in society and the pervasive lack of reliable public information at the earlier stages of the pandemic. Data from the author’s survey (*Figure 24*) shows that some 63.16% of the survey respondents felt discriminated against at home, based on the belief that they carried a health risk and were the main importers of the virus.

## 1.5 POST-COVID-19 PERSPECTIVES

The public discourse on labour migration had emphasised the fact that migration flows will never be quite the same again following the COVID-19 pandemic. However, in the case of the EaP, migrating again once the virus is defeated remains the first preference for migrants who returned home during the acute stages of the crisis (*Figure 25*). If not returning to the same host country (the choice of 68.42% of respondents), 15.79% would be ready to emigrate to another country post-COVID.

This serves to illustrate that the current pandemic is seen as a temporary obstacle in the vision of currently returned migrants. The intention to migrate again is perhaps explained to a great extent by two factors, namely the inability to find a job at home (as has been the case for 74.56% of the author’s survey respondents – *Figure 26*), or the infeasibility of alternative economic activities, such as agriculture. The narrative described by the majority of the interviewed migrants was summarised well by Alexandr, aged 41, who said that “*despite the lack of social protection, or basic rights, the financial gain is comparatively higher for emigration and living in a developed society serves as a bonus reason for choosing migration instead of re-integration.*”

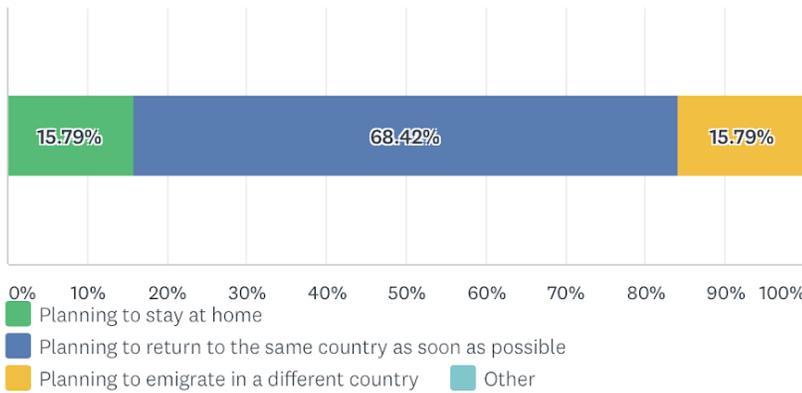


Figure 25: What are your plans after the COVID-19 pandemic?  
Source: Author’s online questionnaire

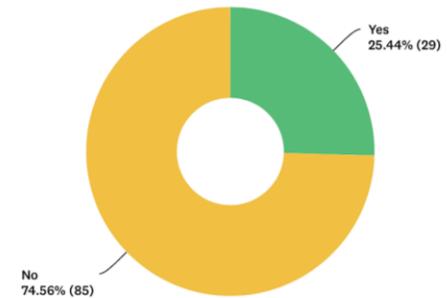


Figure 26: Have you obtained a job at home since your return?  
Source: Author’s online questionnaire

**Figure 27: Migrant workers left in Armenia due to COVID-19 face unemployment**

Source: Harutyunyan, 2020

“Last year, 210,000 Armenian citizens went to Russia looking for work, 80% of all Armenia’s seasonal emigrants.

According to 42-year-old Vahramaberd resident Sevak Kharatyan, working in agriculture is a massive challenge even with zero-interest loans. ‘It’s possible, but not for everyone. I have a homestead; we can always sow fields; we can create means of subsistence. But it is not enough to ensure a future for the children’, he told OC Media.

Expensive seeds, difficulty in marketing produce, and a high incidence of crop-destroying hail have made agriculture a poor prospect for staying out of poverty, he said. In recent years, the annual damage to agriculture from drought, hail, floods, spring frosts, and landslides in Armenia has been estimated at ₴15 billion–₴30 billion (\$30 million–\$60 million).

Tatevik Bezhanyan told OC Media that the fact that workers who could not leave Armenia this year own some land does not mean that they can make a good living.

‘People cannot sell crops; they sell cabbage they grow at ₴10 (\$0.02) per kilogramme’, she said. ‘The mere fact that people did not go to work and stayed in the country is not enough for the land to be cultivated. There is a question of technology, seeds, fertilisers, and irrigation.’”

## 2. DRINKING WATER FROM A FIRE HOSE

Section 2 focuses on the specific challenges faced by the EaP countries due to the COVID-19 crisis in terms of their response to the return of EaP labour migrants. Specifically, **an analysis will be presented of the assistance offered in each EaP country to migrant returnees (remote work support, re-training, social support) by both central governments and, where applicable, local authorities** (since creating new job opportunities at the local and regional level corresponds to Deliverable 6 of the '20 Deliverables for 2020'). This section assesses positive and negative examples of the EaP countries' measures, drawing on case studies from the six countries as a means of comparing and contrasting.

Country	Financial Sector			Direct support to firms					Payment holidays			Temporary controls		Support to individuals			Increased social benefits			Health	External Assistance	
	Policy rate reduced	Liquidity increased	Prudential req. loosened	Wage subsidies	Tax/ social contr. exempted/ reduced	Loan subsidies	Guarantees	Inspections/ audits suspended	Loans	Rent	Utilities	Prices	Exports	Universal transfers	Self-employed	Pensioners	Low income households	Enhanced sick leave	Enhanced unemp. benefits	Public works	Additional spending	(available or negotiated)
Armenia	*			*		*			*				*					*			*	
Azerbaijan				*	*	*			*					*			*	*	*	*	*	*
Belarus			*						*		*	*	*					*	*	*	*	*
Georgia			*	*	*	*		*	*	*	*	*	*					*	*	*	*	*
Moldova	*	*	*	*				*		*								*	*	*	*	*
Ukraine	*	*	*		*			*		*	*	*	*			*		*	*	*	*	*

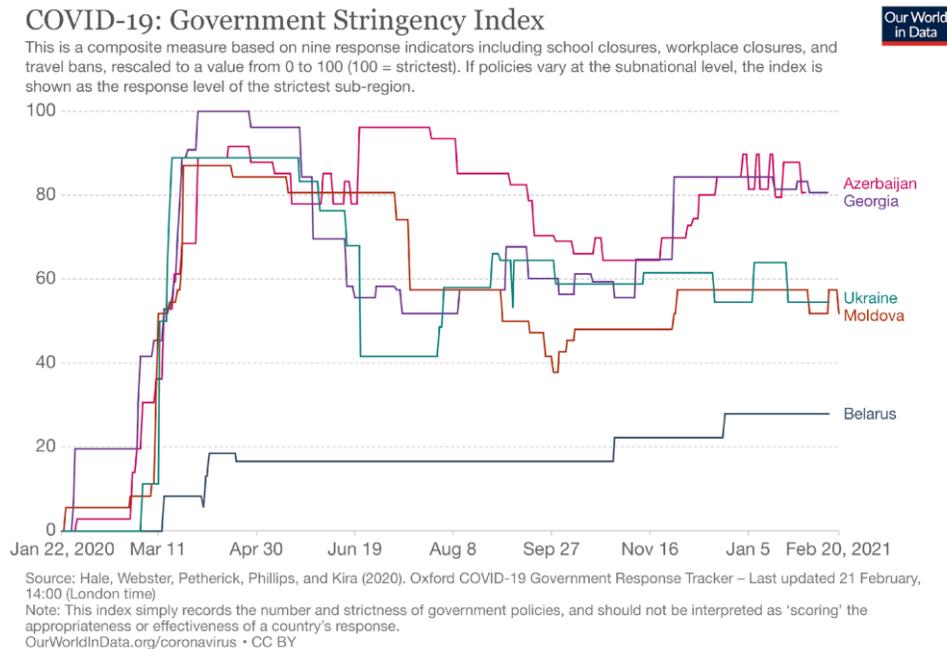
Figure 28: Policy response in EaP - summary chart (as of May 15, 2020)  
Source: EBRD

Along with public health measures, the EaP countries adopted policies to help ease the negative socio-economic impacts of the pandemic. To help mitigate risks, governments started providing financial support and stabilisation packages through the expansion of public borrowing and the receipt of help from national and international donors. Measures taken included providing liquidity to SMEs, encouraging job retention, as well as support for targeted sectors. *Figure 28* outlines a number of the different policy instruments used by governments in the EaP region to provide some semblance of stability and certainty during the early stages of the pandemic.

Governments also tried to ease the negative impacts of the pandemic through social policy measures. Based on the Government Stringency Index (*Figure 29*), Azerbaijan and Georgia had the strictest interventions over the last year – which can arguably be said to have been reflected by the evolution of infection rates in those countries. However, due to limited testing capacities throughout much of the crisis, which inevitably renders the available data incomplete, the causality between the above mentioned is harder to prove.

The policy measures adopted included providing support for vulnerable groups (particularly the elderly and underprivileged) in accessing necessary supplies and amending labour codes to protect employees. Armenia, for example, offered a total package of USD 450 million (2.5% of GDP), including support to companies operating in strongly impacted sectors – such as subsidised loans to pay salaries or taxes, or to finance raw materials or equipment –, the postponement of mortgage loan repayments for six months, a ban on turning off utilities in case of delayed

payment, increased social assistance for vulnerable groups (for example, one-off support for families with young children whose parents are laid off due to COVID-19), and increased spending on healthcare and core social support measures (EBRD, 2020). Among the other specific actions was the support given to employers with 2-5 employees, paying 20% of the salary fund, on the condition that those employees were retained by the company.



*Figure 29: Government Stringency Index*  
Source: Our World in Data

In Azerbaijan, where roughly two-thirds of government revenue and 90% of exports are generated by the hydrocarbon sector, reduced demand and oil prices did not prevent the government from creating a response package totalling some 4.1% of GDP (some EUR 1.6 billion) in order to tackle the crisis. The package included wage subsidies, support for micro-entrepreneurs, an extension of payment deadlines for various taxes, extending loans to businesses on preferential terms or with state guarantees, and subsidising the interest rate on SMEs' existing loan portfolios. The state also expanded unemployment benefits, increased the limit for electricity provision to the households under preferential prices, and covered tuition costs for students from vulnerable groups (EBRD, 2020).

Belarus was the only EaP government not to initiate a total lockdown. The pandemic therefore had a less severe impact on non-tradeable services than in other countries. However, some limitations on economic activity were introduced in Q4 of 2020, on the back of the second wave of the pandemic. In light of those restrictions, a limited support package was designed, focusing on providing additional resources for the healthcare sector, and tax relief and tax deferral measures for most affected companies. Such assistance was primarily implemented at the local government level. On particularly common response to the crisis was subsidising public sector organisations if their production was disrupted due to pandemic. The amount of new directed

loans to State-Owned Enterprises (SOEs) increased significantly, reversing the recent trend of phasing out subsidies to nationalised entities (EBRD, 2020).

The government of Georgia intervened at all levels, providing a total fiscal support package of around 4% of GDP to uphold the private sector and entrepreneurs, boost social assistance, and strengthen the healthcare system. This response was backed by substantial foreign financing. Certain tax payments were postponed, and VAT refunds had doubled by the end of the year, with subsidised interest payments on loans provided for companies in the most affected sectors, and the country’s credit guarantee scheme and income tax exemption for low-paid jobs both scaled up.

Moldova’s crisis response package was the smallest – relative to GDP – of the EaP countries for which data is available, standing at 2% of national output (*Figure 30*). As part of this response, tax payment deadlines were delayed to mid-2020 and tax audits and other controls were temporarily suspended, while the main focus of the central government was on monetary and macro-prudential measures, enacted to inject liquidity.

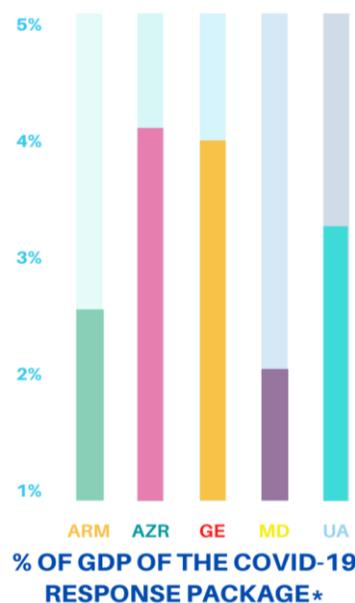
In Ukraine, the crisis response package was equal to 3.1% of GDP, being adopted by parliament on April 13. Initial fiscal measures were focused on temporary tax breaks, tax audit holidays, abolishment of penalties for certain tax wrongdoings, extension of deadlines and an increased threshold for the simplified taxation regime. Subsidised loan programme, credit guarantee scheme and social support programmes were expanded to make them more generous and accessible.

Having presented a general overview above, the next section outline will provide more details on selected measures adopted by the EaP central governments aimed at supporting their economies during the crisis and addressing significant challenges.

## Armenia

In response to COVID-19, Armenia adopted 25 anti-crisis measures to support households and businesses. As of September, the government spent AMD 163.4 billion (USD 340 million or 2.5 % of GDP), exceeding the initially approved AMD 150 billion (approx. USD 313 million) support package.

Measures to support enterprises include efforts to mitigate liquidity risks by co-financing and refinancing loans, as well as interest rate subsidies. Businesses can apply for loans with preferential conditions to pay for salaries, equipment, food imports and raw materials, taxes, duties and utilities. The maximum amount of the financial package for single businesses has amounted to AMD 500 million (approx. USD 1 million). An additional programme was introduced



\* Due to the absence of an official state response package, data for Belarus is not available

*Figure 30: % of GDP of the COVID-19 response package*  
Source: EBRD

for SMEs in tourism, agriculture, food and manufacturing, allowing them to obtain loans of AMD 2.5 to 50 million with a six-month grace period and no interest during the first two years. However, a 12% rate would be applied during the third year. By mid- May, loan applications worth USD 17 million had been approved for 744 entities. Further sector-specific measures were adopted: agricultural entities and co-operative farms benefit from interest rate subsidies and co-financing mechanisms. At the same time, grape suppliers and brandy and wine companies can apply for loans with full interest subsidies. For transport companies operating in the tourism sector, the state will cover 75% of the interest unpaid since April 2020 on existing loans until March 2021. Moreover, the government fosters entrepreneurship through one-time grants in the IT sector and interest-free loans to help individuals launch their business.

Armenia also encouraged job retention through wage subsidies: businesses with 2 to 50 employees received one-time grants to cover every fifth employee's salary (for companies with less than five employees, the amount of support equals the monthly payroll fund divided by the number of employees). A similar measure was implemented in May for businesses with up to 100 employees, provided that they had maintained employment since February. Tourism-related enterprises that have maintained over 70% of their staff or 25% of payroll will benefit from wage subsidies for every third employee for nine months.

Armenia has also introduced social support measures, such as one-time payments worth AMD 68,000 (approx. USD 140) for citizens with limited income who lost their jobs between mid-March and 1 June. Further financial assistance was introduced for pregnant women, low-income families, students, and individuals working in sectors particularly affected by the crisis (incl. hospitality, tourism and retail). The government has approved an additional assistance package to create 1,000 temporary jobs in the agriculture sector (OECD, 2020a).

***Figure 31: CSO perspective - Association of Audio-Visual Reporters NGO (Armenia)***

“At the beginning of the COVID-19 pandemic, the government promised to open new jobs for labour migrants who regularly travelled to work in the post-Soviet space and opened advisory offices. The banks extended payments for loans without fines. But it did not last long, and somewhere in the middle of summer 2020, all promises were forgotten, and labour migrants were looking for ways to somehow get to neighbouring countries to earn money. In September 2020, a war broke out between Armenia and Azerbaijan, and the problems of labour migrants ‘disappeared’. We now have entirely different issues: prisoners of war, devastation, political instability, etc.”

## **Azerbaijan**

Azerbaijan has introduced a broad economic support package worth up to AZN 3.3 billion (approx. USD 2 billion or 4% of GDP). While targeting sectors that were expected to be hit the hardest (including tourism), the government sought to cover tax breaks for businesses, support mortgage borrowers and transport companies, and assist with utility payments. Businesses can

also apply for state guarantees for 60% of the loan amount and 50% interest rate subsidies for selected new loans, along with interest rate subsidies worth 10% of interest expenses for existing loans during one year. As of 17 September, 253 loans worth AZN 52.6 million (USD 31 million) had been approved.

Azerbaijan also amended its Tax Code on 2 June and introduced temporary tax benefits and holidays to minimise adverse effects on businesses. Measures have included eliminating land and property taxes for a year and reductions in profit tax and social security contributions for businesses that the pandemic has particularly impacted. The government also sought to provide financial assistance for individual entrepreneurs, as well as for business owners, to help pay wages through an online platform by transferring funds directly to their bank accounts. By the end of July, over 100,000 micro-entrepreneurs had received AZN 63.55 million (USD 37.4 million), while appeals for almost 30,000 entrepreneurs were approved to help pay salaries in a total amount of almost AZN 98 million (USD 57.7 million). Additional financial support amounting to a monthly wage fund was provided in August for entrepreneurs who had maintained jobs. The Small and Medium Business Development Agency started holding online workshops for entrepreneurs facing economic hardship due to the pandemic as part of raising awareness and providing information regarding the available support measures.

Social support programmes have reportedly helped nearly 5 million citizens. Measures have included retaining jobs and wages for 1.6 million employees in the public and private sectors and social security payments for 2 million individuals. The government also distributed a lump-sum payment to 600 000 low-income individuals between April and May and in August, while further measures were adopted to provide unemployment insurance to 20,000 new beneficiaries and food assistance, create 50,000 jobs in the public sector, and cover utility bills and tuition fees for students from vulnerable groups (OECD, 2020a).

## **Belarus**

Regardless of their assessment of the public health risks of COVID-19 spreading in Belarus, the authorities are well aware that the country must absorb the crisis's economic shock. At the end of April, the government estimated its overall support package, both direct and indirect, at a total amount of BYN 5 to 6 billion (USD 1.9 to 2.3 billion), i.e. 3-4% of annual GDP.

To support the economy given the pandemic, a Decree adopted on 24 April introduced measures targeting the most affected sectors: it notably foresees payment holidays and instalments, rent payment holidays, and municipal authorities' possibility to reduce property taxes. Public procurement procedures were also temporarily simplified. As of 2 October, 47,000 entities and individual entrepreneurs had reportedly benefited from the tax reliefs in the amount of BYN 34 million (USD 13 million), while about 8 000 rent holidays worth over BYN 30 billion (USD 11.45 million) had been approved. Besides, state banks provided state-guaranteed loans of BYN 700 million (USD 267 million) for over 50 businesses. The National Bank has also asked commercial banks to delay loan and interest payments for citizens as their incomes have been affected by COVID-19 and not to raise interest fees. It relaxed specific prudential requirements, reduced the capital conservation buffer's value to 2 percentage points, lowered the liquidity coverage ratio

from 100% to 80% on 22 April, and cut its refinancing rate twice (in May and July) from 8.75% to 7.75%.

Further measures were implemented to support employees. Belarus initially decreed that those unable to return from abroad or work under self-quarantine are entitled to keep their jobs and are entitled to at least two-thirds of their salary. At the end of May, the state also offered subsidies to help maintain employees' wages whose working hours had been reduced between May and July and to pay dues to the state social security fund. Moreover, temporary incapacity benefits were provided to persons taking care of children if the latter were in contact with a COVID-19 infected patient.

Regarding price increases, the Council of Ministers' initial resolution preventing price rises for goods and services from exceeding 0.5% per month was withdrawn. The Ministry of Antimonopoly Regulation and Trade passed a decree on 15 April, enabling the State to regulate prices for 26 essential products (mainly food and sanitary products) by limiting profitability and mark-ups on these items. This measure was extended until the end of 2020. Low-income citizens were granted the social allowance in August even if their rights were to expire in May-July.

Although Belarus did not introduce any strict lockdown regime, the authorities took some containment measures in response to the pandemic, restricting international travels and setting self-isolation rules for citizens and foreigners who tested positive for the virus, as well as for first- and second-level contacts. The city of Minsk took further steps. However, mass events were maintained (OECD, 2020a).

It is worth mentioning that in Belarus, the help package was spent on state-owned companies, while private companies were not the primary concern. Public sector organisations are subsidised if their production was disrupted due to the pandemic. The number of new directed loans to SOEs increased significantly, reversing recent years of phasing them out (EBRD, 2020).

*Figure 32: CSO perspective - CASE Belarus*

Q: What mechanisms of support has your Government provided for returning migrants during the COVID-19 pandemic?

A: None

## **Georgia**

The government of Georgia has committed GEL 3.55 billion (approx. USD 1.1 billion or 7.1% of GDP) to help the economy weather the pandemic's impact. On 24 April, the government presented an anti-crisis package focusing on providing social support (GEL 1.04 billion), stimulating economic growth (GEL 2.11 billion) and strengthening the healthcare system (GEL 350 million) to fight the pandemic. Sector-specific plans were introduced, notably for tourism, agriculture and construction, and additional measures were announced on 6 August.

The central bank has introduced measures to promote liquidity. In contrast, commercial banks have allowed borrowers to postpone loan repayments by up to three months and restructured loans for businesses and individuals struggling with loan repayments. The volume of VAT returns in the private sector was doubled to GEL 1.2 billion (USD 374.4 million) to supply firms with working capital. To further support finance access, the credit guarantee scheme was increased by GEL 330 million, securing a GEL 2 billion credit portfolio with a 90% guarantee on new loans and 30% on restructuring. Moreover, businesses benefit from improved co-financing conditions on loans/leasing and from a micro-grant system, while further funds were allocated to the agro-credit programme. Additional measures have been implemented for sectors that have been particularly affected by the pandemic, such as property and income tax deferrals for the tourism sector and up to 80% interest subsidies on pre-existing loans for small hotels. Reclamation debts from 2012 onwards will be written off for individuals and entities, and irrigation tax in 2020 will be exempted.

Besides, the government offered state subsidies to employers who retained jobs through income tax exemptions worth GEL 250 million (USD 77 million) and lump-sum payments to 250 000 self-employed.

The anti-crisis package also provides targeted social assistance: an estimated 350 000 individuals who lost their jobs or are on unpaid leave are receiving a monthly allowance of GEL 200 for six months. Financial support is granted to low-income families and vulnerable groups; pensions were increased and indexed to the inflation rate starting from January 2021. Further measures have included utility bill and food price subsidies (OECD, 2020a).

## **Moldova**

To finance a range of measures to tackle the impact of the pandemic, the government of Moldova amended its 2020 budget law. In April, the authorities announced that MDL 3.2 billion (USD 190 million) would be allocated to support the economy, businesses and households, including MDL 1.06 billion (USD 63 million) for social insurance and unemployment benefits. But the measures planned as of October reportedly amount to over MDL 4.4 billion (USD 260 million, or 2.1% of GDP).

To help entrepreneurs overcome cash-flow problems, the following measures were adopted: suspension of the audit obligation of individual financial statements for 2019 for some enterprises (except public entities); postponement of the deadline for payments of income tax of legal entities; introduction of a moratorium on all inspections until 1 June; reduction in VAT from 20 to 15% for the food and accommodation sector as of 1 May; an increase of state budget allocations to the emergency fund by MDL 452 million (USD 26.8 million) and a mortgage guarantee programme. Banks were also incentivised to delay payment deadlines and the amounts of due payments on loans. In case of loans contracted by economic agents to pay for salaries or operating assets, the state covers bank interests up to six months payroll. Moreover, on 23 April, a draft law was approved, providing for implementing an Interest Grant Programme facilitating businesses' access to credit until the end of 2020 and a VAT Refund Programme of MDL 1 billion (USD 59 million). Up to LEI 100 million (approx. USD 5.9 million) was allocated to support entrepreneurs:

these funds will notably finance grants for women entrepreneurs, ranging from MDL 165,000 to MDL 1.6 million (respectively USD 9.8 thousand and 95 thousand), to purchase IT equipment. Further measures, including direct financial assistance and increased insurance subsidies, were implemented for the agriculture sector, which is undergoing a severe crisis this year due to both the pandemic and adverse climatic conditions.

*Figure 33: CSO perspective - Labour Institute (Moldova)*

“In the context of the COVID-19 pandemic, when a significant number of fellow citizens returned to the Republic of Moldova, additional measures were taken to support them. Although they did not work in the country and were not entitled to full unemployment benefits when losing their jobs, they received financial support in the amount of MDL 2,775 per month to get out of the problematic situation. The government also expanded access to social services for returnees.”

The government has also assisted businesses that have suspended their activities (fully or partially) by refunding personal income taxes and social security contributions up to 100%. Those who had to stop their operations due to authorities’ decision received a subsidy amounting to 100% of their income tax, social security and health contributions, and other compulsory state payments. This measure was extended several times until September 30. Some public sector employees who contracted the virus received a one-time allowance of MDL 16,000 (USD 950).

Besides, social support measures were introduced. Persons who have worked for at least nine months at one enterprise and have lost their jobs were paid 60 to 80% of their final salary. Overall, the unemployment fund volume was increased roughly six-fold to notably entitle non-beneficiaries – including labour migrants who returned to Moldova after losing their job abroad – to a one-off allowance. The minimum income guaranteed for low-income families was increased in April, and an additional MDL 900 was distributed to an estimated 660,000 pensioners and low-income individuals in October. Pensions and the minimum guaranteed income will be indexed on the inflation rate twice a year.

In order to ease liquidity conditions and enhance financial resilience, the National Bank of Moldova (NBM) cut the base rate applied to the main short-term monetary policy operations to 3.25% (OECD, 2020a).

## Ukraine

On 13 April, Ukraine created a UAH 64.7 billion (USD 2.3 billion) Fund to counter COVID-19. The budget was further increased to UAH 66 billion (USD 2.33 billion), of which 42.8% have reportedly been spent as of 5 October.

A set of measures has been introduced to support individuals and businesses. No penalties were applied to tax law violations committed between 1 March and 31 May 2020, although this exemption did not apply to VAT or excise tax and rent. The deadline for filing annual income

declarations has been extended for two months until 1 July 2020, with tax payable by 1 October 2020. In addition, the parliament has suspended the requirement to pay tax on commercial real estate and land; defined COVID-19 quarantine as a force-majeure for legal contracts; postponed the need to use registrars for settlement transactions, and suspended tax inspections of companies. Tenants have also been temporarily relieved from paying rent on a property that was not used during the quarantine. Entrepreneurs who work independently were offered a temporary exemption from social security contributions in March and April, while fines for incomplete contributions and reporting have been suspended. In September, the Tax Code was amended to cut the VAT rate to 7% for culture, tourism and creative industries, as these sectors can hardly shift to online mode.

Also, Ukraine has introduced policies to provide targeted financial support for small and medium-sized enterprises. State-owned PrivatBank (the country's largest lender) announced a "credit holiday" for medium-sized businesses until the end of May. Credit institutions were prohibited from raising interest rates on loans that have already been issued. To further facilitate access to finance, the government's '5- 7-9%' initiative was reformatted to help SMEs refinance existing loans and retain their employees, allowing them to borrow up to USD 110 000. As of 23 September, 3,506 loans totalling UAH 8.5 billion (USD 300 million) had been issued within this programme, mainly in the agriculture sector (60%). In addition, a new initiative was announced, providing loans of a maximum UAH 5 billion at 0% interest rate, with an 80% state guarantee. Moreover, the National Bank of Ukraine has continued to intervene in the foreign exchange market to support the local currency while reducing interest rates to 8%.

The legislation was passed in March, enabling businesses to adopt more flexible working hours. SMEs that have been forced to suspend their activities during the quarantine are being offered the opportunity to apply for a partial unemployment allowance programme, under which for each hour of lost work time, the company receives two-thirds of the salary rate (the aid must not exceed the minimum wage – UAH 4 723). By the end of August, over 85% of the UAH 2.7 billion (USD 95 million) allocated for this measure had been spent for 370 000 beneficiaries. Other elements include child assistance for individual entrepreneurs.

Along with supporting businesses, the government has introduced social support measures, including subsidising utility bill payments for vulnerable groups, increasing the minimum amount of unemployment benefits by almost 54% as well as pensions, introducing legal grounds to claim unemployment benefits, and offering mortgages at more affordable rates (OECD, 2020a).

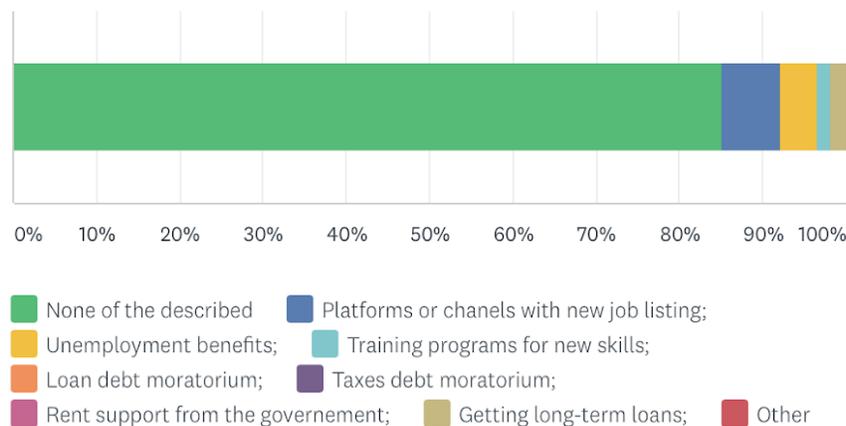
## Regional perspectives

*Figure 34: CSO perspective - Trade Union of Construction Workers and Construction Materials Industry of Ukraine*

"Labour migrants were asked to register with the employment service (to receive unemployment benefits), but they could not use the services of regional employment services, although they were in a state of unemployment. The reason was that some of them worked for a long time 'in the shadows', semi-legally, and were employed in the informal sector, and thus could not count on obtaining unemployed status and unemployment benefits."

Although various response mechanisms have been applied across the region, it has proven difficult to target returning migrants effectively when elaborating support packages. Indeed, in the author’s survey of returned migrants, some 85% of respondents said they had not benefitted from any of the most common state responses, such as unemployment benefits, platforms for new job listings, training programmes for new skills, or long-term loans (*Figure 35*). Although the sample is not very large, this aspect of concern has been corroborated by the author’s interviews with returning migrants, which revealed an indirect apathy and a sense of ‘we are on our own’ as common denominators across the region. In the words of one interviewee, Armenak (aged 31), “*I gave up any reliance on my state. We know that they [public servants] only expect money from us.*”

Thus far, this paper has only examined the response of national governments to the COVID-19 pandemic. Although it is harder to collect data about local government initiatives, experts from the region indicated no coordination between central and local government in providing response packages. Instead, a top-down approach was applied in all six countries, envisioning local administrations as executors of the measures set by the centre.



*Figure 35: What measures of support have you benefited from upon return to your country of origin?*  
Source: Author’s online questionnaire

## 2.1 CSO INITIATIVES

Although the state has provided responses across the region, the role of CSOs has nevertheless been critical. Within this paper, we have sought to understand CSOs’ contributions to handling matters relating to labour migration during the pandemic. We have collected relevant cases described by the CSO experts involved in the research

**Figure 36: CSO perspective - Moldova**

*Source: EaP CSF members survey*

“A contributing project dedicated to labour migration is ‘Migration and Local Development’, funded by the Swiss Agency for Development and Cooperation (SDC), which supports the Moldovan authorities in adjusting and strengthening the legal and institutional framework in the field of labour migration management, to encourage regular and safe migration and to facilitate the reintegration of Moldovan migrants into the labour market in the Republic of Moldova, including through the recognition of the informal and informal qualifications acquired abroad. Through the Programme for Attracting Remittances to the Economy (PARE 1+1), ODIMM offers a chance for a future at home for people interested in returning from abroad and starting a business.”

(Labour Institute)

“MIDL, in partnership with the UNDP, provides assistance and financial support to Indigenous Peoples' Associations in capacity building, community and economic projects. Achievements include: a more coherent evidence-based legislative framework for labour migration, developed in a participatory manner; a pilot mechanism for the recognition of informal and non-formal skills in the field of construction, catering, education and environmental protection; and the expansion and strengthening of the model for involving migrants in local development. As a result, the Indigenous Peoples' Association, in cooperation with local administrations and with the active participation of the diaspora, implemented 44 projects, improving the living conditions of more than 77,000 people in localities.

A new innovative organic economic development model was developed. Local economic agents were mobilised in active partnerships with local governments and indigenous associations to improve the local business environment in 35 communities.”

(IDIS Viitorul)

**Figure 37: IOM Helps Identify Migration Targets in Armenia**

The International Organisation for Migration (IOM) is an active actor on migration in the region. For instance, it holds socialisation events on Sustainable Development Goals (SDG) and the importance of migration as a development factor for Armenia. To help measure this, IOM developed its Migration Governance Index (MGI), piloted in 15 countries – in the region including Moldova and Turkey – and will extend to 100 more.

## 2.2 RETURN AND REINTEGRATION AMIDST UNPREPAREDNESS

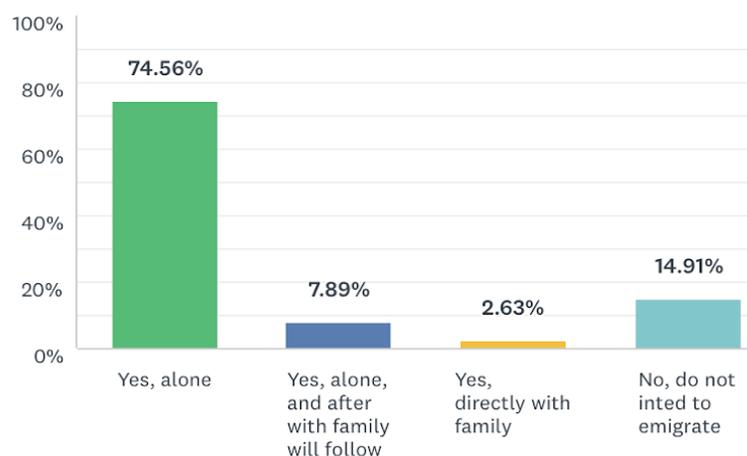
Involuntary return caused by the COVID-19 crisis can have significant long and short-term consequences for home countries. The challenge for those countries, therefore, is managing such

returns to ensure positive developmental results. One way of doing this is through the provision of effective reintegration strategies, however, these are rare in developing countries, and where they do exist, they are often conceived in reaction to emergencies (Global Forum on Migration and Development, 2009). This poses significant challenges for returnees and ultimately makes forced return migration more of a developmental challenge than an opportunity. This may further foster migrants’ re-emigration – which appears to be the case for the EaP.

According to the IOM, despite the impact of the COVID-19 pandemic on the welfare, revenue, remittances and plans of migrants, for many, their future prospects remain attached to the hope of returning to their previous host country rather than seeking economic opportunities at home (IOM, 2020).

In the case of Moldova, a survey of 1186 Moldovan migrants revealed that COVID-19 has temporarily undone the rationale of some Moldovans to migrate, especially for those employed as domestic workers and in the so-called gig-economy: 20% of Moldovan migrants abroad work under in precarious conditions, with 47% having lost their jobs or seen their activities suspended, while 57% of them having not received any compensation or unemployment support (UNDP Moldova, 2020a). Up to 30% of migrants abroad indicated the intention to return, of which 67% as soon as possible and 31% for an extended period. As returning migrants in high numbers are bound to face challenges while seeking to reintegrate and establish new livelihoods, this will have a significant impact on unemployment.

On the other hand, the same UNDP data (2020a) also indicates that half of Moldovans abroad were not planning on returning to Moldova after the pandemic, while the results of this author’s survey suggest that a majority (74.56%) of migrants having indeed returned home to the EaP countries are considering re-emigration (*Figure 38*). Therefore, despite the antagonistic conditions of working abroad, migration is on top of the list for economic opportunities for returned migrants once it becomes clear that reintegration at home is a utopic prospect for them.



*Figure 38: Do you intend to emigrate again post COVID-19?*  
Source: Author’s online questionnaire

This appears to be true also for the majority of Ukraine's multi-million strong migrant labour workforce in particular, who would instead prefer to return to the EU than take advantage of the various initiatives currently being offered by the Ukrainian authorities. Ukraine's apparent inability to retain its workers will likely be further exposed in the coming months as many potential labour migrants are already eyeing the opportunity of working in Germany, which has relaxed its work permit rules for non-EU nationals. In 2019, 45% of Ukrainians working in Poland confessed that they were considering taking a job in another EU country, mainly in Germany (Dubenko, 2020).

**Figure 39: Case Study - Male migrant to Germany and the UK**

Vitaliy returned home (to Moldova) in September 2020. When COVID-19 hit, he was self-employed in the industrial cleaning industry in the UK, and he faced high levels of stress maintaining his work. Due to limited job offers at the beginning of the summer, he emigrated to Germany and switched his job to the logistics sector. Despite little experience, he chose to seek new economic opportunities instead of returning to home. His workload was 7/7, without holidays.

*"I have a mortgage at home that I have to pay this year. That is the main reason I work so intensely, and I am not concerned with my health. If I continue in the same rhythm, I aim to gather enough capital to start a business at home in around three years."*

However, in September 2020 he returned home. *"Our project finished in Germany and I had no place to work. I came home and found a place of work through my friends as a delivery transporter. Little money, but good to keep me going. That lasted until November 2020, when I received a new job offer in Germany and got back to work. Now I returned to the UK since construction offers started to come."*

### 3. EU RESPONSE TO LABOUR MIGRATION

*This section explores the policies of EU member states towards migrants from the EaP countries during the COVID-19 crisis, providing a better understanding of the labour assistance and protection measures provided to EaP labour migrants employed in the EU.*

The number of immigrants within the top economies of the EU is growing (*Figure 40*): over the last five years, the number of immigrants has increased by 5.6 million in Germany alone. In discussing labour migration before the pandemic, several significant issues such as documentation, regulation of informal labour activity and social protection for labour migrants were already topics of concern. However, with the low level of mobility and health security resulting from the pandemic, the imperative for EU member states to develop appropriate policy responses increased.

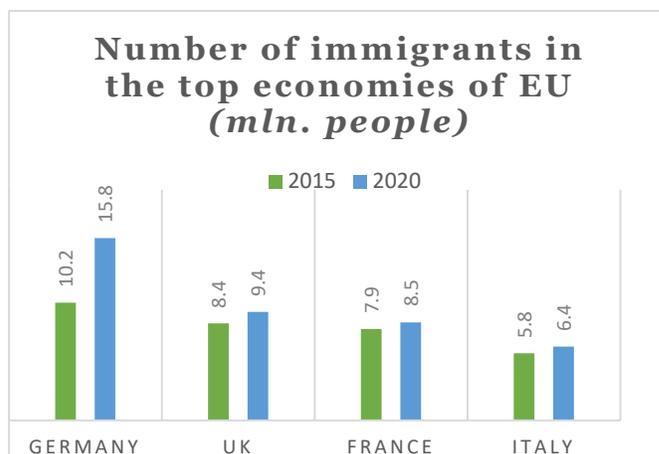


Figure 40: Number of immigrants in the top economies of EU (million people)  
Source: Eurostat, 2020

Indeed, faced with a shortage of essential workers due to mobility restrictions, many EU member states took swift action to mobilise migrants currently present on their territory, for example by (i) facilitating their access to the labour market, (ii) changing their visa status (e.g. from student to worker), or (iii) allowing seasonal workers already in the country to extend their residence status (in the case of legal workers) or regularise their status temporarily.

According to the European Migration Network (2020), the European Commission has adopted guidelines concerning the implementation of temporary restrictions on non-essential travel to the EU, and on the effects of this on visa policy, identifying a range of essential occupations which would be allowed to enter the EU. Some member states implemented the Commission’s recommendations and authorised third-country nationals working in these occupational sectors to enter the territory of the host country despite the closure of borders, as was the case in Finland, where the permitted occupational sectors were grouped into three categories and closely reflected the Commission guidelines, while others adopted variations on the Commission’s chosen approach. For example, a number of member states did not explicitly follow the guidelines but did put in place measures to exempt several categories of essential workers from general mobility restrictions, limiting the categories to those considered most crucial in light of national priorities and needs. In Lithuania, the movement of goods was considered a priority and, accordingly, exemptions were applied to third-country national workers working in related sectors. In Spain, several exceptions to these restrictions were provided based on the essential or key nature of the passenger category in question, while in Hungary the police examined arrivals on a case-by-case basis. Poland and Slovakia did not identify occupational sectors to be considered officially as ‘essential’ during the COVID-19 crisis; nonetheless, both member states applied exemptions for seasonal workers, with Poland also exempting third-country nationals working in the transportation sector and agricultural holdings operating on both sides of the Polish border. Even though Ireland is not part of the Schengen Area and the Irish border was not been closed during the pandemic, the processing of visa applications stopped except for some third-country national categories, including workers in the healthcare and transport sector, diplomats or the personnel

of international organisations, with applications from medical personnel prioritised under the atypical working scheme and the employment permits system.

***Figure 41: Case Study – Ukrainian short-term workers in Poland***

*Source: Prague Process, 2020a*

“Poland is by far the prime destination for Ukrainian seasonal workers, with some 45 thousand people accounted for in 2018. Having obtained about 99% of all seasonal work permits in 2018, Ukrainians constitute Polish agriculture’s key workforce. The demand surges from May to September, with the peak usually reached in June.

Seasonal workers are considered essential throughout the coronavirus-crisis, especially when they perform critical harvesting, planting or tending functions. Therefore, the Polish authorities have made steps towards legalising the stay of foreigners whose documents expire during the state of emergency. The respective measures have been in vigour since 14 March. Their validity has been extended to seasonal workers.

According to the Polish border guards, even newbie labourers could enter the country with seasonal permits, which is in line with the European Commission's guidance of 30 March to derogate workers from third countries such as Ukraine.

While the introduced preliminary measures seemed to prevent the agriculture sector from major losses, the reality might be different due to the following reasons. Seasonal workers require a special work permit, which is not always issued before entry. Many Ukrainians enter Poland as short-term visa-free travellers before their employers apply for a seasonal work permit. In such cases, the workers can stay in Poland for up to 3 months. Meanwhile, they are entitled to work for up to 9 months when entering the country with a visa and the permit already in their hands.

Nevertheless, entering visa-free seems to be more accessible and more popular - out of 121,436 foreigners, 86,034 (70%) have entered the country for stays limited to 3 months. However, potential seasonal workers are no longer allowed to enter visa-free nowadays. These potential workers cannot obtain visas either since the Polish consulates, and visa centers in Ukraine are closed. Moreover, the closing of airports, bus and train stations are further impeding mobility. Finally, the requirement to remain in isolation for 14 days after entering Poland and Ukraine represents another major obstacle.

As a result, only those Ukrainians who were already present in Poland may become seasonal workers in practice. Also, the estimated 30% of Ukrainians in Poland who lost their job or work reduced hours could potentially work in the fields. Meanwhile, those seasonal workers remaining in Ukraine who planned to come in May or June had few options to do, unless policy measures tailored to bring them were issued.

## EU Policy Responses

As seen above, most EU countries did not introduce new policies or procedures to facilitate the entry of third-country nationals working in essential occupations to ensure that labour market needs were being met during the COVID-19 crisis. However, some of those countries did in practice introduce general adaptations, for example, by facilitating the issuance of permits/visas or expediting processing.

Specific policies or procedures to facilitate the entry of essential workers from third-countries were introduced in five EU Member States: France, Hungary, Latvia, Lithuania, and Spain. For example, in Spain, streamlining and prioritisation measures were introduced in the processing of all files of foreign nationals with a professional profile in the agricultural and health sectors. In Hungary, new provisions enabled citizens of neighbouring countries and Hungarian citizens working in the agricultural sector but without a Hungarian address to enter the territory collectively in groups in an organised, prearranged way at certain border crossing points. According to a new order in Lithuania, the procedure for issuing temporary residence permits to foreigners during the quarantine period was approved, providing certain exceptions to the issue and renewal of temporary residence permits for foreigners working in Lithuanian companies engaged in international transport of goods by all types of vehicles and holding a document certifying their right to stay or reside in Lithuania.

In France, new measures were introduced to authorise seasonal workers in the medical sector to work or continue working. For example, non-EU qualified practitioners were temporarily authorised to continue their probationary period in a new hospital to extend their permit duration. Moreover, the government relaxed the conditions of practice for foreign doctors, in particular by authorising those who were not entitled to practice to instead carry out non-medical functions (e.g. care assistant, reception and orientation, etc.) to support health care teams involved in managing the crisis. Non-EU seasonal workers legally residing in an EU member state were authorised to work in France from 20 May 2020 if the employer respected several health measures. In the healthcare sector, the activity of non-EU qualified practitioners already in practice or on probation was temporarily extended during the health crisis. Finally, foreign doctors with refugee status were permitted to be recruited by public health establishments as an associated contract worker without passing the knowledge verification tests.

As discussed previously, even before COVID-19, migrants from non-EU countries were

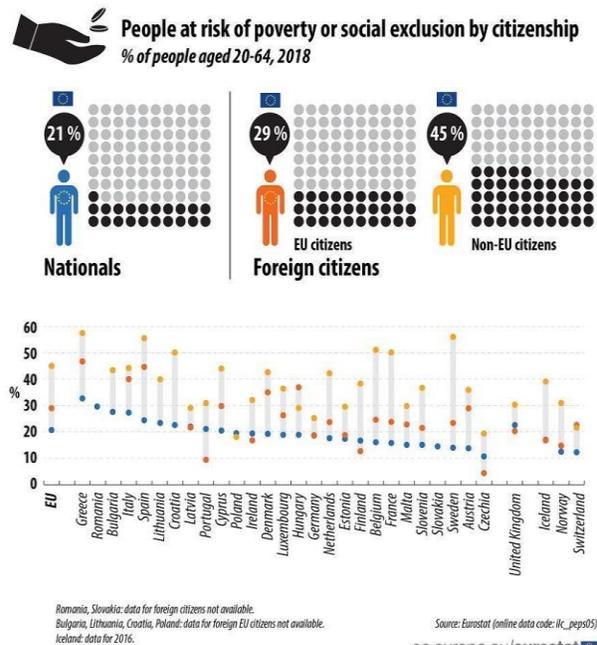
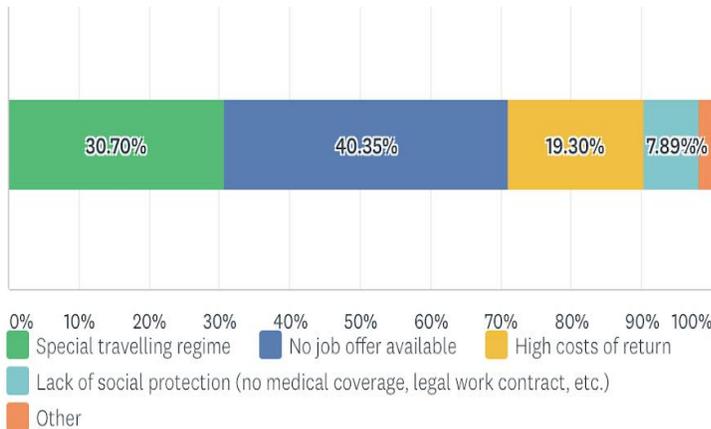


Figure 42: People at risk of poverty or social exclusion by citizenship  
Source: Eurostat, 2018

already among the population ns most at risk of poverty and social exclusion (*Figure 42*). Despite this, a key fact established by this paper is the intention of returned migrants to emigrate again, raising the question of how to tackle some of the more pervasive obstacles to EaP labour migrants' improved well-being in the EU member states. According to the author's survey, the main bottlenecks for return at this time are a shortage of job offers (for 40.35% of respondents), coupled with the special travelling regime (30.70%). Bearing in mind that among the returned migrants are a considerable number of people at risk of poverty, including temporary and low-skilled migrants, the high costs of return and integration of migrants from the EaP is clearly another factor for consideration.



*Figure 43: What current bottlenecks impede your emigration at the moment?*

*Source: Author's online questionnaire*

Although it is currently too early to estimate the impact of vaccination on labour migration, by the end of 2021, more clarity will be added with respect to the conditionalities for labour migration. Vaccinations in the EaP region are progressing at a slow pace due to limited access to vaccines. However, if vaccination will be required to travel to certain EU countries, the mobility of labour migrants will be impeded even more, preventing, or at the very least increasing the costs of, their re-emigration.

#### 4. ROADMAP FOR DELIVERABLE 17

*Section 4 addresses the implications of current policies in realising Deliverable 17 of the '20 Deliverables for 2020', and its perspectives in the post- COVID period.*

The Visa Liberalisation Dialogues and Mobility Partnerships agreed under Deliverable 17 of the Eastern Partnership agenda are among the most tangible results of the current EaP roadmap. Three out of the six countries (Georgia, Moldova, and Ukraine) now benefit from a visa liberalisation regime and continue to work towards the benchmarks of their respective Visa Liberalisation Action Plans, while visa facilitation and readmission agreements with Belarus entered into force in 2020. In parallel, integrated border-management (IBM) strategies have been introduced in most EaP countries (Armenia, Georgia, Moldova, and Ukraine) to facilitate structured cooperation, with the modernisation of border crossing points ongoing. Crossing points between Poland and Ukraine, and Moldova and Ukraine, have been assisted in operating jointly, and specific country programmes are operating, even in the context of the COVID-19 crisis.

Over the past two decades, all six EaP countries have seen considerable outflows of local populations, ranging from a net migration rate of -0.2 in Azerbaijan to -13.9 in Georgia between

1995-2015. In line with their obligations under the Visa Suspension Mechanism, and the overarching objectives of Deliverable 17, Georgia, Moldova and Ukraine, where growing numbers of irregular migrants have been ordered to return (*Figure 44*). In 2020, it is likely that these numbers will have fallen again, however, this will be explained for the most part by the COVID-19 pandemic and resulting border closures, which led to a significant decline in the number of irregular migrant arrivals to Europe from 128,536 in 2019 to fewer than 68,000 as of October 2020.



*Figure 44: Data on irregular migration in the EU for Georgia, Moldova, and Ukraine (respectively)  
Source: Eurostat, 2019*

As this paper has shown, all six countries will come out of the pandemic economically affected, meaning that more people will likely have reasons to try to move to those EU member states that have suffered the least. With a higher average response package (4.3% of GDP across the EU on average – EBRD, 2020), in theory doing more to mitigate the socio-economic effects of the crisis, the EU will remain economically attractive to many. That is why it is vital to continue consistent and coherent actions in the area of migration policy.

The main fields for intervention in the region are: implementing more robust labour migration frameworks which address the needs of different migrant profiles; promoting skills-matching for migrants and returnees and taking measures to retain national human capital; improving data collection and analysis to inform evidence-based policymaking and implementation across migration issues; reintegration of refugees and returnees; and migrant healthcare.

The main challenges that should be addressed under the post-2020 and post-COVID EaP agenda are:

- **Limited alternatives to irregular migration.** Circular migration schemes (CMS) and the like can help solve unauthorised employment and illegal stays of EaP citizens in the Schengen zone. Implementing CMS should be an inclusive and transparent process in which

all stakeholders, including the state, partner countries, migrants, private and non-governmental sectors, have realistic and well-informed expectations and share mutually agreed responsibilities and goals. Moreover, along with creating strong return and reintegration mechanisms, effective monitoring and evaluation practices need to be set for measuring the progress and impact of CMS.

- **Little to no existing communication channels with the EaP migrants in Europe.** Expanding the mandates of consular attachés and engaging diaspora are essential for breaking links in the chain of irregular migration.
- **Lack of online smart-customs across the entire region and EU**, including big-data analysis for automated risk management and electronic queues.
- **Reintegration of the EaP citizens returning from the EU.** Despite the existence of reintegration programmes in the region, there are currently no state assistance programmes, thus carrying the risk of exacerbating the poor reintegration observed during the COVID-19 pandemic (Grigoryan, 2019).
- **Slow progress on launching and enhancing Visa Liberalisation Dialogues.** With internal displacement in Armenia and Azerbaijan, and poor respect for human rights in Belarus (and indeed Azerbaijan), visa liberalisation processes will remain slow for as long as they are conditioned on democratic reforms – a conditionality on solid grounds. Unless, boosting human rights and democratic reforms will ignite – the promise of Visa Liberalisation is to be stifled.

## UNTAPPED OPPORTUNITIES

Despite the EaP region generally serving as a source for unskilled labour for the EU member states, EaP countries could seek to benefit from and enhance its pool of skilled workers by making use of Intra-Corporate Transferees (ICT). Also known as a ‘seconded’, an ICT is defined in EU law (Directive 2014/66/EU) as a third-country national on a temporary secondment for occupational or training purposes, who resides outside the EU and is bound by an existing work contract.

To fulfil the legal criteria, a ICT needs to: 1) have an existing employment contract with the relevant company (for at least three un-interrupted months); and 2) provide details of salary, qualifications, duration of the assignment, seniority of the role and ability to return after the assignment. It is essential to highlight that ICTs must legally be paid the same or above the accepted levels for a comparable position on the local market. This status is granted for twelve months and can be extended up to a maximum of three years.

High-skilled migration, and Intra-Corporate Transferees (ICTs) in particular, represent a clear and distinct category of workers who provide services and skills which cannot be found locally in EU member states, who come for a limited amount of time on relatively high salaries, and positively contribute to their host country economically. With ICTs migrating only temporarily, and being bound to return home after the assignment, national governments from the EaP region

could seek to use this particular status to support skills development – particularly among younger professionals – and stimulate controlled (and temporary) labour migration.

Returning migrants can bring investments and create jobs: for example, a survey of the Moldovan diaspora suggested that some 39% could bring new knowledge and skills on their return home (UNDP Moldova, 2020a). Of course, even the most skilled workers require support to thrive when returning home, in the form of career guidance and recruitment services, and requalification and vocational training, as well as social and financial assistance. Yet, if managed correctly and given appropriate support, migrants forced to repatriate because of COVID-19 can be significant contributors to their home country's development, and may represent the beginning of serious attempts to stem systemic issues around 'brain drains'.

In the long-term, attempts to retain returning migrant workers – and to stem the flow of new emigration from the EaP countries to the EU – will require concerted efforts at quality job creation by the EaP governments. Indeed, with the outbreak of COVID-19 inciting EU governments and business to adopt near-shoring strategies to avoid a reliance on migrant labour, the EaP countries should use this opportunity to counter the historic trend of human capital depletion through parallel efforts in job creation and strengthening economic ties with the EU. From the EU side, considering EaP countries as the first best option for FDI would be an effective way of supporting EaP partners' efforts to boost their human capital.

## 5. NEXT STEPS AND RECOMMENDATIONS

*Section 5 provides a number of **recommendations** for the 6 EaP governments, the EU institutions and member states, and relevant businesses and CSOs both in the EU and the EaP region. The recommendations for further developing work and skills in these countries will be founded on creating a future-oriented culture, developing sound labour reintegration policy responses, and initiating appropriate and adapted corresponding foresight exercises.*

The outbreak of COVID-19 in the Eastern Partnership region placed a heavy burden on the countries' respective economies. Dependent on remittances, many affected households faced exposure to poverty, while rising unemployment catalysed economic involution, reducing the ability of the EaP states to hold on to the human capital which had temporarily returned to their shores. Indeed, many expected EaP citizens abroad to head home in large numbers, with returning migrants reintegrating with relative ease – this paving the way for a long-awaited 'brain regain'. However, just one-third of EaP labour migrants abroad chose to return, with this decision driven mainly by constraints than by pure choice. Once the crisis is over, the majority will likely choose to migrate again.

The COVID-19 crisis also revealed governments to be woefully unprepared. Despite diaspora engagement and re-integration programmes prior to the pandemic, the operational capacity of the labour markets and welfare systems from the region could not face the sudden increase in service demand. Although crisis response packages were passed, the trend across the region was to implement survival mechanisms based on pre-crisis demographic realities, rather than to adapt to the increase in requirements presented by large numbers of returning migrants. In other words,

the invitation for labour migrants to return home was more suited to ‘normal’ times, rather than in the current turmoil. Particular shortcomings in efforts to re-integrate migrants included the low number of educational reconversion programmes, high spikes of unemployment, limited mobility and access to healthcare within the country of origin and limited to no access to alternative economic activities.

What could have served as an opportunity to reverse years of ‘brain drain’ has hence turned more into a temporary, involuntary return which will likely be reversed in the most part following the end of the crisis. However, clearly the pandemic is far from over – therefore, space for solutions still exists. Job creation and a well-adapted social support package are the short-term answers for the immediate needs of returned migrants. Beyond this, the overarching concern of many migrants is the macro development indicators of their country: for the Eastern Partnership diaspora, overall perceptions about the development of their state of origin serve as a key basis for their perspectives of returning home, and of remaining there once they do so (UNDP Armenia, 2020). The potential of labour migration to be tapped as a development vehicle is a policy decision that needs to be established at the national level.

There are no fast solutions for the numerous labour and migration-related issues within the EaP region. However, a key driver behind any progress is strong institutional development. For instance, an IOM survey of Moldovans (2020) revealed a belief that successful reintegration at home should be preceded by three factors: (i), institutional-administrative reforms, such as eradicating corruption, reducing bureaucratic barriers, promoting political stability, transparent communication on existing reintegration opportunities in the country; (ii), economic measures like attracting foreign investments, efficient implementation of some new economic development projects which take account of the specific needs of returned migrants, creation of jobs for those returning, support for small entrepreneurs, promoting local agriculture and protecting the local market for the sale of agri-food products, creation of opportunities of professional reintegration home, and reducing the shadow economy; and (iii), measures of a social nature such as raising salaries for workers in the medical field, financial support of vulnerable workers, and promoting social justice. When asked to prioritise these actions, the top three recommendations were eradicating corruption, creating jobs, and supporting entrepreneurs.

The main expectations of the EaP diaspora is for their state of origin to (i), provide humanitarian support and reintegration subsidies through the implementation of social programmes to cover the initial basic needs of those needing or wanting to return, as well as addressing the specific medical needs of returned migrants (with particular reference to public health insurance coverage); and (ii), implement reintegration programmes, including through requalification schemes, recognition of non-formal education and skills, support to small enterprises, and more (IOM, 2020).

However, policy responses to migration in the context of the COVID-19 crisis and beyond should be more than a reactive, short-term intervention. Rather, the emerging cross-sectoral turmoil unfolding within the region should be seen as an impetus for fostering real human capital development to ensure resilience and recovery. Without such efforts, what was initially seen as a

'brain regain' during the return of labour migrants to their country of origin could become a permanent 'brain drain'.

To this end, this paper presents the following set of recommendations:

### **To the Eastern Partnership governments:**

In the long run, the challenge for national authorities in the EaP region is to understand why their country's labour migrants believe the grass is always greener elsewhere. Is it just a matter of higher salaries and better working conditions, or are long-term prospects a significant factor? What would convince these migrants to remain in EaP instead of departing? Serious research is required to identify answers to these critical questions and draw the necessary conclusions.

To tackle the current impact of COVID-19 on labour migration, the following measures are considered pertinent:

1. Elaborate and ensure implementation of a **coherent and coordinated policy on migration** to EU countries.
2. Create and strengthen **effective mechanisms for accessible and live monitoring of migration flows**. Improving the collection and analysis of data related to in- and out-migration can allow for such information to be used in evidence-based programming.
3. Enhance **circular migration programmes** to safeguard the premises of "decent work", to maximise the benefits of well-organised seasonal migration, and to protect migrants from exploitation in foreign labour markets.
4. Develop **professional reconversion programmes for returning migrants** to industries with potential labour force shortages.
5. Provide **vocational training and job placement support** to returning migrants. Introduce education and training in the package of policy responses to support migrants.
6. Ensure the **financial sustainability of state programmes and activities** targeting migration, and avoid heavy dependence on donor support.
7. **Channel remittances to investments rather than consumption** to control inflation through entrepreneurship development programmes targeted at returning migrants.
8. Use a pilot **area-based approach to support communities affected by migration**, especially those home to vulnerable populations such as persons left behind by migrating family members, returnees, IDPs, ethnic minorities and/or those who perceive migration as their sole viable livelihood strategy.
9. Increase **cooperation with consular authorities in receiving countries as well as diaspora communities** to prepare a better-organised response and provide

assistance to migrants in crisis, while further building consular crisis management capacities.

10. Establish **bilateral labour migration schemes** with neighbouring destination countries and strengthen in-country vocational programmes aimed at establishing partnerships with employers in receiving countries in order to facilitate legal labour migration.
11. Provide **migrant protection and improve information and services** for returning migrants.

### To the EU member states:

1. Ensure the development of **healthcare assistance programmes** for labour migrants in host countries.
2. Support cooperation between governments of sending and receiving countries on **identifying labour force needs and organising orderly labour migration for fields with the highest demand**. As long as mobility restrictions are in place, labour migration can occur in a more targeted way, responding mainly to the receiving countries' sectoral needs.
3. Broaden **regularisation practices** to reveal the real numbers and situations of irregular migrants, workers and overstayers, and to improve their legal protections whenever possible.
4. **Recognise domestic work as a form of legal labour migration**, granting health and social protection rights, and the right to family reunification, etc. to migrants working in the domestic sector.
5. Enhance **circular migration programmes** to safeguard the premises of “decent work”, to maximise the benefits of well-organised seasonal migration, and to protect migrants from exploitation in EU markets.

### To the EU institutions:

1. Develop **multilateral EU programmes dedicated to the migration-development nexus**, involving several origin and destination countries.
2. Ensure **migration dialogues with partner countries** in order to improve policy coherence.
3. Engage the **European Labour Authority** in the Eastern Partnership region, starting with the facilitation of access to information about labour mobility, security, cooperation and exchange of information.

4. Enhance the implementation of a uniform mechanism of **Intra-Corporate Transferees (ICTs)**.
5. Improve the functioning of **work permit routes for non-EU migrants** to reach Europe and enforce respect for migrant and refugee workers' rights. Existing EU legislation on regular migration, such as the Seasonal Workers Directive and the Blue Card Directive, have proven to be inadequate to ensure that migrant workers' rights are respected. Therefore, the European Commission should expand and strengthen existing legal migration pilot projects in dialogue with trade unions and other organisations working with migrant workers. These mechanisms should enable migrant workers to apply in-country, accrue residence rights, convert permit types and change employer. EU instruments like the Seasonal Workers Directive should also be amended accordingly to make these provisions binding on all member states. Member states participating in the projects should commit to and be held accountable for providing decent working conditions. Provisions on workers' and victims' rights in the EU and national instruments should also be better enforced, so enforcement does not focus predominantly on migration status.
6. Address the situation of **agri-food workers** during the COVID-19 pandemic as a matter of urgency. The working and living conditions of many labourers along the food supply chain, and in agriculture are generally sub-standard. Such conditions now also put these workers at heightened risk of contracting the virus. The EU and its member states should do whatever it takes, including mobilising additional funding, to ensure decent accommodation, access to water, rapid testing and the provision of protective equipment for workers in European fields and processing plants. EU funds should also be directly channelled to civil society organisations that carry out outreach among farmworkers and address their basic needs. Moreover, all workers and their family members affected by COVID-19 should be able to take leave with full pay without fear of losing their jobs or income.
7. Support **nearshoring FDI strategies in EaP countries** in the manufacturing sector. The pandemic has imposed changes on global value chains due to limited mobility and transportation constraints. Once a new map for manufacturing has been outlined, the EaP region can serve as a target for further investment, based on its proximity.
8. Mainstream labour migration in the advocacy agenda of the **EaP Panel on Migration, Mobility and Integrated Border Management**. Priorities for discussion should include ensuring a coordinated response to COVID-19, addressing human and labour rights of migrants (including the right to equal pay, decent working and living conditions), tackling the negative effects of migration on sending countries, and regulating of social security issues on the bilateral level.

## To EaP-based CSOs:

1. Develop **financial literacy programmes** for migrant workers and their families, to ensure sustainable financial management of households and long-term development strategies.
2. Build programmes in partnership with EU CSOs for **re-integration within local and national social and economic dynamics**.
3. Support and initiate **private-public partnerships** to design and develop an alternative digital data monitoring tool on migration flows from the EaP to the EU.
4. Create and increase the service and assistance portfolio for labour migrants from the EaP countries in the EU. Provide information, primary consultancy on working rights, documentation, and resources on accessing support.
5. Develop partnerships with CSOs from the EU, in order to **run common programmes and enhance advocacy efforts** across the region and on the European Commission Agenda.
6. Initiate and ensure continuity of **tailored programmes for vulnerable categories of the population seeking migration**, in order to prevent human trafficking, organised crime, etc.

## To businesses:

1. Reduce **transaction costs of remittance transfers** and ensure financial education and literacy. Enable easy access to remittance transfer channels, including digital ones.
2. Initiate and invest in business cooperation within the EU to **tap the potential of Intra-Corporate Transferees (ICTs)**.
3. Support **reintegration and recruiting of returning workforces**. A set of measures should be adopted to reintegrate employees who were subject to technical unemployment or unpaid leave due to the pandemic, and to hire citizens who used to work abroad. Such efforts are essential for the country's economic development, and for lowering unemployment levels.
4. Develop and implement **on-the-job training and qualification programmes**, in order to facilitate the re-integration of labour migrants in the local labour market.

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## ANNEXES: COUNTRY DATA SETS ON MIGRATION

Source: Migration Data Portal ([www.migrationdataportal.org](http://www.migrationdataportal.org))

### ARMENIA

#### Key migration statistics

#### Immigration & emigration

Total number of international migrants at mid-year 2020  
(UN DESA, 2020) **190.3 thousand**

International migrant stock as a percentage of the total population at mid-year 2020  
(UN DESA, 2020) **6.4 %**

Total number of emigrants at mid-year 2020  
(UN DESA, 2020) **958.2 thousand**

Net migration (immigrants minus emigrants) in the 5 years prior to  
(UN DESA, 2019) **-25 thousand**

Difference in the share of migrants in the total population between 2000 and 2020  
(UN DESA, 2020) **-15**

Share of female migrants in the international migrant stock at mid-year 2020  
(UN DESA, 2020) **59 %**

Share of international migrants 19 years and younger residing in the country/region at mid-year 2020 **8.4 %**

#### International migrant stock (%)



#### Refugees in host country (total, UNHCR estimates)



#### Additional country resources

Armenia - Migration Profile (Migration Policy Institute) 2016

Armenia - Migration Profile Light (Prague Process) 2014

Armenia - Migration Profile (Migration Policy Centre) 2013

Armenia - Extended Migration Profile (Prague Process) 2011

#### Context

Total population at mid-year 2020  
(UN DESA, 2020) **3 million**

Population ages 0-14 (% of total in 2018)  
(UN DESA, 2019) **20.1 %**

Population growth in 2018 (%)  
(UN DESA, 2019) **0.2 %**

Human Development Index Ranking in (1 = High; 188 = Low)  
(UNDP) **83**

Unemployment rate of the total population in 2019  
(ILO, 2019) **18.3 %**

Youth unemployment rate in 2019  
(ILO, 2019) **38.7 %**

Total population projection for 2050 (Medium variant)  
(UN DESA, 2019) **2.8 million**

Percentage of population residing in urban areas in 2018  
(UN DESA, 2018) **63.1 %**

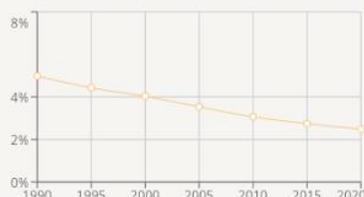
## AZERBAIJAN

### Key migration statistics

#### Immigration & emigration

Total number of international migrants at mid-year 2020 (UN DESA, 2020)	<b>252.2 thousand</b>
International migrant stock as a percentage of the total population at mid-year 2020 (UN DESA, 2020)	<b>2.5 %</b>
Total number of emigrants at mid-year 2020 (UN DESA, 2020)	<b>1.2 million</b>
Net migration (immigrants minus emigrants) in the 5 years prior to (UN DESA, 2019)	<b>6 thousand</b>
Difference in the share of migrants in the total population between 2000 and 2020 (UN DESA, 2020)	<b>-1.5</b>
Share of female migrants in the international migrant stock at mid-year 2020 (UN DESA, 2020)	<b>52 %</b>
Share of international migrants 19 years and younger residing in the country/region at mid-year 2020 (UN DESA, 2020)	<b>12.6 %</b>

#### International migrant stock (%)



#### Refugees in host country (total, UNHCR estimates)



#### Additional country resources

- Azerbaijan - Migration Profile Light (Prague Process) 2015
- Azerbaijan - Migration Profile (Migration Policy Centre) 2013
- Azerbaijan - Extended Migration Profile (Prague Process) 2010
- Azerbaijan - Migration Profile (IOM) 2008

#### Context

Total population at mid-year 2020 (UN DESA, 2020)	<b>10.1 million</b>
Population ages 0-14 (% of total in 2018) (UN DESA, 2019)	<b>23.3 %</b>
Population growth in 2018 (%) (UN DESA, 2019)	<b>0.9 %</b>
Human Development Index Ranking in (1 = High; 188 = Low) (UNDP)	<b>82</b>
Unemployment rate of the total population in 2019 (ILO, 2019)	<b>5 %</b>
Youth unemployment rate in 2019 (ILO, 2019)	<b>14 %</b>
Total population projection for 2050 (Medium variant) (UN DESA, 2019)	<b>11.1 million</b>
Percentage of population residing in urban areas in 2018 (UN DESA, 2018)	<b>55.7 %</b>

## BELARUS

### Key migration statistics

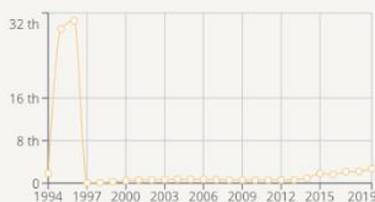
#### Immigration & emigration

Total number of international migrants at mid-year 2020 (UN DESA, 2020)	<b>1.1 million</b>
International migrant stock as a percentage of the total population at mid-year 2020 (UN DESA, 2020)	<b>11.3 %</b>
Total number of emigrants at mid-year 2020 (UN DESA, 2020)	<b>1.5 million</b>
Net migration (immigrants minus emigrants) in the 5 years prior to (UN DESA, 2019)	<b>43.6 thousand</b>
Difference in the share of migrants in the total population between 2000 and 2020 (UN DESA, 2020)	<b>-0.1</b>
Share of female migrants in the international migrant stock at mid-year 2020 (UN DESA, 2020)	<b>54.2 %</b>
Share of international migrants 19 years and younger residing in the country/region at mid-year 2020 (UN DESA, 2020)	<b>4.9 %</b>
Share of international migrants 65 years and older residing in the country/region at mid-year 2020 (UN DESA, 2020)	<b>23 %</b>

#### International migrant stock (%)



#### Refugees in host country (total, UNHCR estimates)



#### Additional country resources

Belarus - Migration Profile (Migration Policy Centre) 2013

#### Context

Total population at mid-year 2020 (UN DESA, 2020)	<b>9.4 million</b>
Population ages 0-14 (% of total in 2018) (UN DESA, 2019)	<b>17 %</b>
Population growth in 2018 (%) (UN DESA, 2019)	<b>-0.1 %</b>
Human Development Index Ranking in (1 = High; 188 = Low) (UNDP)	<b>53</b>
Unemployment rate of the total population in 2019 (ILO, 2019)	<b>0.5 %</b>
Youth unemployment rate in 2019 (ILO, 2019)	<b>1.1 %</b>
Total population projection for 2050 (Medium variant) (UN DESA, 2019)	<b>8.6 million</b>
Percentage of population residing in urban areas in 2018 (UN DESA, 2018)	<b>78.6 %</b>

## GEORGIA

### Key migration statistics

#### Immigration & emigration

Total number of international migrants at mid-year 2020 (UN DESA, 2020)	<b>79.4 thousand</b>
International migrant stock as a percentage of the total population at mid-year 2020 (UN DESA, 2020)	<b>2 %</b>
Total number of emigrants at mid-year 2020 (UN DESA, 2020)	<b>861.1 thousand</b>
Net migration (immigrants minus emigrants) in the 5 years prior to (UN DESA, 2019)	<b>-50 thousand</b>
Difference in the share of migrants in the total population between 2000 and 2020 (UN DESA, 2020)	<b>0.2</b>
Share of female migrants in the international migrant stock at mid-year 2020 (UN DESA, 2020)	<b>56.1 %</b>
Share of international migrants 19 years and younger residing in the country/region at mid-year 2020 (UN DESA, 2020)	<b>21.4 %</b>
Share of international migrants 65 years and older residing in the country/region at mid-year 2020 (UN DESA, 2020)	<b>20.2 %</b>

#### International migrant stock (%)



#### Refugees in host country (total, UNHCR estimates)



#### Additional country resources

- [Georgia - Migration Profile \(Prague Process\) 2017](#)
- [Georgia - Migration Profile \(Migration Policy Institute\) 2017](#)
- [Georgia - Migration Governance Indicators \(IOM\) 2016](#)
- [Georgia - Migration Profile \(Prague Process\) 2015](#)
- [Georgia - Migration Profile \(Migration Policy Centre\) 2013](#)
- [Georgia - Extended Migration Profile \(Prague Process\) 2011](#)
- [Georgia - Migration Profile \(IOM\) 2008](#)

#### Context

Total population at mid-year 2020 (UN DESA, 2020)	<b>4 million</b>
Population ages 0-14 (% of total in 2018) (UN DESA, 2019)	<b>19.4 %</b>
Population growth in 2018 (%) (UN DESA, 2019)	<b>0.1 %</b>
Human Development Index Ranking in (1 = High; 188 = Low) (UNDP)	<b>70</b>
Unemployment rate of the total population in 2019 (ILO, 2019)	<b>11.6 %</b>
Youth unemployment rate in 2019 (ILO, 2019)	<b>28.4 %</b>
Total population projection for 2050 (Medium variant) (UN DESA, 2019)	<b>3.5 million</b>
Percentage of population residing in urban areas in 2018 (UN DESA, 2018)	<b>58.6 %</b>

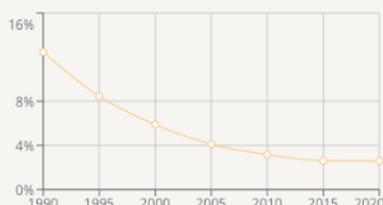
## REPUBLIC OF MOLDOVA

### Key migration statistics

#### Immigration & emigration

Total number of international migrants at mid-year 2020 (UN DESA, 2020)	<b>104.4 thousand</b>
International migrant stock as a percentage of the total population at mid-year 2020 (UN DESA, 2020)	<b>2.6 %</b>
Total number of emigrants at mid-year 2020 (UN DESA, 2020)	<b>1.2 million</b>
Net migration (immigrants minus emigrants) in the 5 years prior to (UN DESA, 2019)	<b>-6.9 thousand</b>
Difference in the share of migrants in the total population between 2000 and 2020 (UN DESA, 2020)	<b>-3.3</b>
Share of female migrants in the international migrant stock at mid-year 2020 (UN DESA, 2020)	<b>59.1 %</b>
Share of international migrants 19 years and younger residing in the country/region at mid-year 2020 (UN DESA, 2020)	<b>15.1 %</b>
Share of international migrants 65 years and older residing in the country/region at mid-year 2020 (UN DESA, 2020)	<b>28.7 %</b>

#### International migrant stock (%)



#### Refugees in host country (total, UNHCR estimates)



#### Additional country resources

- Republic of Moldova - Migration Profile (Migration Policy Institute) 2017
- Republic of Moldova - Migration Governance Indicators (IOM) 2016
- Republic of Moldova - Migration Profile Light (Prague Process) 2015
- Republic of Moldova - Extended Migration Profile (Prague Process) 2010 - 2015
- Republic of Moldova - Extended Migration Profile (IOM) 2010 - 2015
- Republic of Moldova - Migration Profile (Migration Policy Centre) 2013
- Republic of Moldova - Migration Profile (IOM) 2008-2013

#### Context

Total population at mid-year 2020 (UN DESA, 2020)	<b>4 million</b>
Population ages 0-14 (% of total in 2018) (UN DESA, 2019)	<b>15.8 %</b>
Population growth in 2018 (%) (UN DESA, 2019)	<b>-0.1 %</b>
Human Development Index Ranking in (1 = High; 188 = Low) (UNDP)	<b>112</b>
Unemployment rate of the total population in 2019 (ILO, 2019)	<b>4.4 %</b>
Youth unemployment rate in 2019 (ILO, 2019)	<b>12.6 %</b>
Total population projection for 2050 (Medium variant) (UN DESA, 2019)	<b>3.4 million</b>
Percentage of population residing in urban areas in 2018 (UN DESA, 2018)	<b>42.6 %</b>

## UKRAINE

### Key migration statistics

#### Immigration & emigration

Total number of international migrants at mid-year 2020 **5 million**  
(UN DESA, 2020)

International migrant stock as a percentage of the total population at mid-year 2020 **11.4 %**  
(UN DESA, 2020)

Total number of emigrants at mid-year 2020 **6.1 million**  
(UN DESA, 2020)

Net migration (immigrants minus emigrants) in the 5 years prior to 2020 **50 thousand**  
(UN DESA, 2019)

Difference in the share of migrants in the total population between 2000 and 2020 **0.1**  
(UN DESA, 2020)

Share of female migrants in the international migrant stock at mid-year 2020 **57 %**  
(UN DESA, 2020)

Share of international migrants 19 years and younger residing in the country/region at mid-year 2020 **6.8 %**  
(UN DESA, 2020)

Share of international migrants 65 years and older residing in the country/region at mid-year 2020 **20.3 %**  
(UN DESA, 2020)

#### International migrant stock (%)



#### Refugees in host country (total, UNHCR estimates)



#### Additional country resources

Ukraine - Migration Profile (Migration Policy Institute) 2017

Ukraine - Policy Data - International Migration Institute (DEMIG) 2015

Ukraine - Migration Profile (Migration Policy Centre) 2013

Ukraine - Extended Migration Profile (Prague Process) 2011

Ukraine - Migration Profile (IOM) 2008

#### Context

Total population at mid-year 2020 **43.7 million**  
(UN DESA, 2020)

Population ages 0-14 (% of total in 2018) **15.8 %**  
(UN DESA, 2019)

Population growth in 2018 (%) **-0.5 %**  
(UN DESA, 2019)

Human Development Index Ranking in (1 = High; 188 = Low) **88**  
(UNDP)

Unemployment rate of the total population in 2019 **9 %**  
(ILO, 2019)

Youth unemployment rate in 2019 **22.4 %**  
(ILO, 2019)

Total population projection for 2050 (Medium variant) **35.2 million**  
(UN DESA, 2019)

Percentage of population residing in urban areas in 2018 **69.4 %**  
(UN DESA, 2018)

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