

MIGRATION AND SKILLS IN GEORGIA

RESULTS OF THE 2011/12 MIGRATION SURVEY ON
THE RELATIONSHIP BETWEEN SKILLS, MIGRATION AND
DEVELOPMENT



Manuscript completed in November 2012.

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European Training Foundation and
Business Consulting Group Research (Georgia)

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PREFACE

Building on its prior experience in skills and migration studies, the European Training Foundation (ETF) launched a project investigating the relationship between migration, development and skills in three countries in 2011, namely Armenia, Georgia and Morocco. One output of this project is this country report, which presents and discusses the results of a large-scale survey implemented in all regions of Georgia between October and December 2011. The survey sample included 4 000 respondents, consisting of both 'potential migrants' (including individuals who intend and do not intend to migrate) and 'returned migrants' (including both short-term and long-term returnees).

Business Consulting Group (BCG) Research was contracted as the local partner for project implementation in Georgia (Tender No CFT/11/ETF/0014). It was responsible for conducting the survey and for drafting the country report according to ETF methodology and in close cooperation with ETF staff.

BCG Research invested great efforts in the implementation of this project. We thank BCG experts – in particular, Irina Badurashvili, Rusudan Nadiradze, Rusudan Velidze, Mamuka Nadareishvili and Mamuka Apakidze – for their intellectual input in analysing the data and drafting the report. We thank supervisors, interviewers and data entry operators for their tremendous fieldwork efforts and also enumerators, technical and office staff for their professional expertise and hard work. Our thanks and appreciations also go to colleagues from different local and international organisations, including the European Union (EU) Delegation and Georgian public institutions that collaborated in project implementation. The cooperation of these institutions and researchers gave important insights into migration in Georgia.

On the ETF side, special thanks are due to all those who enabled the project to get off the ground and who dedicated freely of their resources during conception, implementation and finalisation of the project, despite their involvement in many other projects. We refer, in particular, to the core ETF migration team (Eva Jansova, Ummuhan Bardak, Eduarda Castel Branco, Outi Karkkainen and Arne Baumann) and ETF peer reviewers of this report (Arjen Vos and Siria Taurelli). Eva Jansova deserves special mention for her accurate, reliable and diligent data checking and management work. Dr Michael Collyer from the University of Sussex also contributed valuable input in his role as international ETF team expert.

EXECUTIVE SUMMARY

Following independence in 1991, Georgia faced a series of political crises that devastated the economy and had a dramatic impact on migration patterns. Post-independence migration has been marked by three significant stages, each closely linked with political and economic developments. In 2011, Georgia's employment and unemployment rates were 55.4% and 15.1% respectively. As the official measure of employment includes people working for free in their own households and as self-employment encompasses work for a mere one hour a week on the land, the International Labour Organisation suggests that a truer estimate of the unemployment rate is 30% to 35%. Youth unemployment overall is also high (around 36%), but tends to be even higher among urban and better educated young people. Since over 50% of employment is provided by the agricultural sector, marked by low productivity and a lack of social protection, large majority has a precarious life.

Under these difficult conditions of high unemployment and underemployment, international migration offers an outlet for Georgians and fulfils an essential role in the Georgian economy. Although the compilation of migration statistics has been disrupted by post-independence crises and data quality is still problematic, it is estimated that the migrant stock abroad is over one million people (25% of the Georgian population) and that temporary migration flows annually involve between 6% and 10% of the population. There is also evidence that a growing number of women participate in international migration (between a third and a half of the total). Dependence on migrants is significant, with around 5% of households receiving remittances that make up around half of their budgets.

This report describes the findings for the ETF migration and skills survey conducted in Georgia. Chapter 1, which provides background information on Georgia, aims to bring readers up to date on pre-existing knowledge regarding migration flows and the links with Georgian labour market, education and training trends. This chapter also reviews migration-related policies and institutions, including bilateral and multilateral agreements and joint initiatives on migration management.

Chapter 2 describes the survey methodology in terms of target groups and questionnaires, sampling techniques, fieldwork, problems encountered and data analysis and also describes the key composite indicators constructed, referring to migration propensity, social conditions, economic conditions and migration and return outcomes.

Chapters 3 and 4 describe findings for potential and returned migrants respectively. Potential migrants are divided into two subgroups: prospective migrants (with an intention to migrate) and non-migrants (with no intention to migrate). The survey indicates that almost one third of people aged 18-50 years living in Georgia are prospective migrants; further analysis of intentions in terms of readiness confirms that 11.4% of Georgians are ready to migrate at any moment. The tendency to (re)migrate is particularly high (close to 50%) among returnees. The fact that almost a quarter of returnees had more than one migration experience indicates a circular pattern. The intention to go abroad is most likely expressed by young single people (more men than women) with lower and upper secondary general or vocational education, by people from urban areas more than from the capital (Tbilisi) and rural areas and by people without work or with precarious and poorly paid jobs. Returnees are predominantly middle-aged men from rural areas, generally married with children in the home country and with upper secondary general and higher education.

Although the potential migrant and returned migrant groups are not fully comparable due to the methodology used, the findings for the former seem to signal slightly changing trends: the current propensity to migrate is lower for younger, better educated people than for older educated generations, for whom it was more difficult to find work in the domestic market. Nevertheless, the main reasons for migration do not vary much between the two groups: unemployment, poor pay and career opportunities and the need to improve living standards. Furthermore, the Georgian population has relatively high formal educational levels and this is reflected in its migrants, who are relatively well educated by international standards (almost 30% have university education and another 30% have vocational education). Female migrants tend to be better educated than males: in both samples a third of women have university degree compared to under a quarter of men.

Destination countries for Georgian migrants are quite diverse. Referring to returnees, the top three destinations were Turkey (32%), Russia (29%) and Greece (13%), with a quarter of all returnees choosing the EU. Returnees who had migrated more than once most likely went to Turkey or Russia; visa requirements seemed to be a conditioning factor as Georgians need an entry visa for Russia but not for Turkey. Women showed a slight preference for an EU country, whereas men tended to prefer countries in the Commonwealth of Independent States (CIS). People with low and intermediate level education went to Turkey or Russia, whereas better educated people went to the USA, Italy or Germany.

As for prospective migrants, patterns were similar. The most likely destinations were Turkey, the USA, Italy and Russia. Patterns of migration by gender and education level were also similar but more accentuated: better educated people

(half of them with university education) and more women stated their intention to emigrate to the EU (44% of female prospective migrants) and the USA. This shift in country preferences may signal the EU as an increasingly attractive destination, possibly attributable to Georgia's geopolitical orientation and entry difficulties for Russia.

Georgian migrants usually stay abroad for slightly under three years per migration period. Personal and family reasons are stated as the main reason for return, but difficulties regarding work and legal status also play a role. Few prospective or returned migrants are aware of official programmes helping people to go abroad or to return home: only 6% of migrants received some kind of pre-departure training before migration (mostly language training) and only one female migrant received support on return. These data suggest that many Georgian migrants may arrive unprepared to the destination country and face problems in the labour market. Many migrants rely on informal contacts and help from family or friends already living abroad. Indeed, help with finding work (abroad or at home after return) is the service most demanded by migrants (40% would attend pre-departure training if available). This picture confirms the very limited opportunities and support measures for legal labour migration and insufficient access by the general public to information concerning the few existing initiatives funded by the EU or other donors.

The main employment sectors abroad are domestic service for women (more in demand in the EU countries) and construction for men (more in demand in countries of the CIS). Most migrants worked as waged workers, about 16% as employers or self-employed workers and 5% as casual workers. The vast majority of migrants (95%) worked in skilled and unskilled jobs. Given the relatively high educational profile of migrants, many people perform jobs abroad that do not correspond to their education and skills. Indeed, 48% confirmed that they had worked at below their education level. This was more typically the case of women migrants: 70% of them worked in unskilled jobs. Similarly, a higher proportion of EU returnees had worked below their education level. Some positive correlation between work and education was found only for migrants with intermediate vocational education.

The skills mismatch may be explained by the fact that less well-educated people leave for countries outside the EU and have more opportunities to find a better job that corresponds to their qualification level. Another explanation is linked to the recognition of qualifications: almost 30% of interviewed returnees (more men than women) mentioned that their educational qualifications were officially recognised in the destination country. This recognition seems to partially facilitate a better correspondence between education and work abroad. Nonetheless, the main factors contributing to the skills mismatch are the irregular status of many Georgian labour migrants in EU countries and the restricted range of jobs available to migrants. According to our survey, only 5% of the respondents had obtained an official work permit from relevant authorities and 21% of migrants managed to obtain an official residence permit during their stay abroad. Around 14% of migrants had a written contract with employers abroad, but very few migrants were covered by a social security scheme (3%).

One positive consequence of migration is the experience and skills gained abroad. The survey shows that 9.9% of interviewed returnees studied or received formal training when abroad; this figure was significantly higher for respondents with higher education (20.3%). The most frequent training was language training (more women), followed by vocational training (equal for both sexes) and then by graduate or post-graduate courses (more women). As a result, one third of the respondents confirmed that they had acquired new skills when abroad: language skills (13.1%), vocational/technical skills (12.5%), skills related to workplace organisation, culture and ethics (9.4%) and entrepreneurship skills (5.4%).

Difficulties experienced in return are confirmed by the fact that only one third of returnees managed to find a job on return and only a quarter worked at the time of interview. Even so, the returnees were slightly better off than the potential migrants in labour market. The fact that the work of returnees was about the same before and after migration seems linked to sluggish domestic labour market conditions. In terms of current work, most returned migrants work as skilled or unskilled workers, mostly in the same sectors in which they worked abroad (with the exception of domestic work). With respect to the type of work, most are wage employees but around 12% specifically mentioned having started their own business. Looking at the migration experience as a facilitating factor for employment on return, 41.8% of returnees employed upon return declared that their experience abroad helped them find a better job in Georgia (around 12% of all returnees). Moreover, the share of those who use migration-acquired skills in their daily work is 67.5% (around 20% of all returnees).

The overall benefits of migration and return were calculated using a number of composite indicators. Based on migration and return outcome indicators, 55% of returnees seem to have had successful migration experiences abroad, while 45% of returnees managed to make a positive impact on their lives after return. Overall, 64% of migrants regularly sent remittances back to their families in Georgia (EUR 261 on average per month). Most of these remittances were spent on family living expenses, although buying a property, investment in children's education and payment of debts were also mentioned by few.

Half of the returnees stated that they had not felt any impact of migration on their life after they returned to Georgia. A more successful return seemed to be positively correlated to education level, as educated people reported enjoying a more successful return than less educated people. A large share of Georgian migrants benefit from the immediate

impact of migration, namely, remittances, but they seem unable to use their migration experience and savings to improve their living standards on return. Returnees are unable to convert their experience abroad into a significant premium on the Georgian labour market, despite having far more work experience than peers who did not go abroad. Although this may be a short-term impact (the long-term impact is as yet unknown), specific support measures could help improve the situation of migrants. Key recommendations regarding more beneficial migration include the need for a clear national migration strategy, bolstered by concrete policies and specific measures implemented by state and other organisations.

The survey confirms the close links between sustained migration flows from Georgia and insufficient employment opportunities and unsatisfactory work conditions. Labour market conditions drive decisions by potential migrants and by returnees unable to take advantage of their migration experience. Given the government's economic liberalism, more support in the provision of employment and job opportunities for citizens (including migrants) seems to be the most important priority. Nevertheless, migration will possibly continue as the only solution for many families that are surviving thanks to remittances from abroad. Creating effective mechanisms for managing and monitoring migration flows is necessary to ensure a win-win situation for all the parties involved. Increasing legal labour mobility through circular schemes may contribute to extracting greater benefits from migration and return.

The EU Mobility Partnership agreement provides an opportunity for all parties to better exploit labour migration. Activities and joint projects activated under this framework can facilitate circular migration and mobility and provide migrant support measures before and after migration. The gradual extension of visa liberalisation would seem to be an important aid to circularity, while the conclusion of labour and social security agreements (including regarding the portability of social benefits to the home country) between Georgia and the main destination countries could ensure beneficial migration and sustainable return. The opportunities offered by circular migration also require new actions related to skills testing and validation and quality vocational training. In this regard, it is necessary to improve national mechanisms to meet international skill standards and ensure qualified and competitive human resources in both domestic and foreign labour markets.

In terms of concrete policy initiatives, the findings of this migration survey suggest the following.

- Effective pre-departure training could be expanded considerably and should address issues such as language skills, vocational qualifications and information about rights and obligations when working abroad.
- Better information about available jobs abroad and job-skill matching services could help reduce skills mismatches in destination countries, e.g. via reinforced cross-national placement services (extension of the EURES job mobility portal).
- Comprehensive validation and recognition of migrants' skills and qualifications in destination countries would make better use of skills and so reduce brain waste.
- The potential of returnees to aid the development of Georgia could be harvested through adequate return support schemes that promote the sustainable return of individuals (e.g. validation of skills acquired abroad, effective job-search and placement services).
- Particular attention should be given to effective use of remittances and savings in business investment since the provision of entrepreneurial support to returnees seems crucial to improving poor labour market conditions.
- Specific civil society, non-governmental and institutional measures are needed for vulnerable groups marginalised due to migration (e.g. single mothers and abandoned children) to help mitigate the negative social impact of migration on families and communities.
- Permanent and temporary returnees and diaspora can both contribute to the formation of a middle class and to economic development via investment and the contribution of new labour market skills and also through socio-political learning and transnational networks.
- In terms of legal provisions, attention needs to be paid to the motivations behind migration and return and migrants should be able to easily go back and forth between the home and destination countries.

1. COUNTRY BACKGROUND

According to the International Organisation for Migration (IOM), Georgia is primarily a country of origin of emigrant flows directed mainly towards Russia, the USA, Greece, Germany, Turkey, Austria and a number of other EU member states such as France and Spain (IOM, 2008). As a typical post-Soviet country, Georgia has been seriously affected by out-migration since independence was proclaimed in 1991. The last Georgian population census (2002) registered a drop of some 20% in population from the 1989 census, partly due to the decline in fertility but mainly due to emigration. For the period 1989 to 2005, of the countries in the Commonwealth of Independent States (CIS), Georgia had the second highest net emigration rate after Kazakhstan (Mansoor and Quillin, 2007).

1.1 MIGRATION FLOWS AND CHARACTERISTICS

During the Soviet period, ethnic Georgians tended to remain in Georgia, with more than 95% living in the Georgian Soviet republic. Following independence many Russians living in Georgia returned to Russia; the migration outflow became even greater in the following years due to social and economic crises and the dramatic deterioration in living conditions, which were substantially worse than in Russia. The flows remained steady during 1992 to 1996 and stabilised by the end of the decade when migration became significantly lower if still globally negative. Since 2004 the net migration trend has become more erratic with a largely unexplained migratory inflow in 2005, a negative balance between inflows and outflows in 2006, 2007 and 2008 and positive net migration in 2009 and 2010.

Note that migration statistics for the 1990s cannot be considered reliable due to the inability of Georgian administrative bodies to capture data on large-scale outflows. Alternative estimates of emigration have been made by local experts (Tsuladze et al., 2009) and by international organisations (UN, 2012; World Bank, 2011a). Since 2004 Georgian migration statistics have been based on statistics supplied by the Georgian Border Department; however, these data consist of gross entry and exit numbers and there is no system to distinguish migrants from other passengers. Nevertheless, the 2002 population census provided data that enabled reliable estimates of outflows to be calculated for 1989 to 2002 (State Department for Statistics of Georgia, 2003) (TABLE 1.1).

TABLE 1.1 NET MIGRATION IN GEORGIA, 1989-2010

| Year | Number (in 000) | Rate (per 1 000) | Year | Number (in 000) | Rate (per 1 000) |
|------|-----------------|------------------|------|-----------------|------------------|
| 1989 | -17.9 | -3.7 | 2000 | -35.2 | -8.0 |
| 1990 | -13.2 | -2.4 | 2001 | -31.2 | -7.1 |
| 1991 | -22.6 | -4.1 | 2002 | -29.1 | -6.7 |
| 1992 | -139.3 | -25.8 | 2003 | -27.6 | -6.4 |
| 1993 | -140.9 | -27.4 | 2004 | 5.5 | 1.3 |
| 1994 | -142.6 | -29.3 | 2005 | 76.3 | 17.5 |
| 1995 | -127.2 | -28.2 | 2006 | -12.1 | -2.8 |
| 1996 | -123.1 | -27.5 | 2007 | -20.7 | -4.7 |
| 1997 | -59.9 | -13.5 | 2008 | -10.2 | -2.3 |
| 1998 | -39.2 | -8.7 | 2009 | 34.2 | 7.8 |
| 1999 | -36.3 | -8.1 | 2010 | 29.5 | 6.6 |

Source: Authors, based on Geostat data

Based on these estimates of intensity of outflows, some researchers (CRRC, 2007, p. 7) have classified emigration in three phases: collapse and conflict (1990-95); economic struggle (1996-2004); and hope and economic rebuilding (after 2004). Each phase is marked by specific characteristics and implications resulting from the peculiarities of the political and socio-economic developments of each period.

In the first phase, non-Georgians constituted the biggest outflow of emigrants and, as a result, the share of ethnic minorities shrank from 29.9% in 1989 to 16.2% in 2002. The chaos of the early 1990s resulting from the transition crisis and the dramatic deterioration in living conditions also spurred emigration by ethnic Georgians – mainly highly skilled people and elites moving primarily to neighbouring Russia (which imposed no visa requirements at that time).

In the second phase, many Georgians emigrated for temporary or even permanent settlement due to the prolonged socio-economic crisis and the lack of prospects for improvement. On this occasion, emigration, primarily economically-driven and temporary, continued at an increasingly brisk pace. Europe and North America became increasingly popular destinations for Georgians, although Russia continued to be the primary destination until a visa regime for Georgians going to Russia was introduced in December 2000, when Ukraine came to be seen as a close substitute. More and more emigrants also started moving to Western countries.

Georgian official statistics for the third phase indicate a substantial decrease in migration outflows, with even inflows recorded for recent years. However, a different picture is revealed if the numbers of asylum applicants are considered, as growing numbers of Georgians are applying for political asylum in third countries. With the number of applications peaking at 11 000, Georgia moved to 10th place in 2009 from 21st place in 2006 in a United Nations High Commissioner for Refugees (UNHCR) list of 44 asylum-seeker countries of origin (UNHCR, 2010).

According to United Nations' estimates, the share of international migrants in the overall population fell steadily from 6.2% in 1990 to 4% in 2010 (**TABLE 1.2**). The annual rate of change in the migrant stock has not changed since 1995, remaining persistently negative at -2.7% of the total population.

TABLE 1.2 MIGRATION PROFILE FOR GEORGIA, 1990-2010

| Indicator | 1990 | 1995 | 2000 | 2005 | 2010 |
|--|-----------|-----------|-----------|-----------|-----------|
| International migrants at mid-year (est.) | 338 300 | 249 900 | 218 600 | 191 220 | 167 269 |
| Refugees at mid-year (est.) | 0 | 50 | 6 400 | 2 528 | 1 210 |
| Population at mid-year | 5 460 000 | 5 069 000 | 4 745 000 | 4 465 000 | 4 219 000 |
| Female migrants at mid-year (est.) | 190 206 | 141 112 | 124 389 | 109 084 | 95 496 |
| Male migrants at mid-year (est.) | 148 094 | 108 788 | 94 211 | 82 136 | 71 773 |
| International migrants as % of the population | 6.2 | 4.9 | 4.6 | 4.3 | 4 |
| Female migrants as % of international migrants | 56.2 | 56.5 | 56.9 | 57 | 57.1 |
| Refugees as % of international migrants | 0 | 0 | 2.9 | 1.3 | 0.7 |
| Indicator | 1990-95 | 1995-2000 | 2000-05 | 2005-10 | |
| Annual rate of change in migrant stock (%) | -6.1 | -2.7 | -2.7 | -2.7 | |

Source: UN, 2009

The current emigration pattern, which has unfolded at a relatively stable rate over the past few years, is believed to be largely temporary labour migration, involving between 6% and 10% of the total population. According to the last nationally representative survey of migration in Georgia, around 140 000 migrants are estimated to be currently abroad and another 138 000 are estimated to be returnees (CRRC/ISSET, 2010, p. 9). Hence, between 7% and 8% of the current Georgian population has experienced some kind of migration, i.e. they are either absent or returned migrants. According to the World Bank (2011a), there are just over one million emigrant stock abroad (1 057 700 persons, or 25.1% of the population).

Migration destinations and means

Two thirds of Georgians who live abroad are settled in CIS countries. Most migrants live in Russia (over 60%), followed by Armenia and Ukraine (7.2% and 6.8% respectively), then by Greece, Israel and the USA with shares ranging between 2.4% and 4% (World Bank, 2011a). The World Bank methodology is based on estimates for total bilateral migrant stocks for 2005 (Ratha and Shaw, 2007), later updated by the UN Population Division (UN, 2009). Since these figures are based on migrant place of birth and citizenship according to population censuses conducted in the destination countries they may not adequately reflect all irregular outflows.

The IOM (2008) confirms Russia as the main destination for Georgians, followed by the USA, Greece, Germany, Turkey, Austria and other EU member states such as Spain. However, the IOM also recognises that a significant proportion of the migration to Russia is irregular, with estimates ranging from 200,000 to as many as one million legal and undocumented emigrants. Russia has traditionally been a popular destination due to easy entry and pre-existing historical and economic ties, geographical and cultural proximity and knowledge of the language. Due to changes in Georgia's geopolitical orientation and a standoff with Russia that culminated in the introduction of a visa regime in 2000, armed conflict and closure of the border in 2008, the latter started losing its attractiveness as the main destination for Georgian migrants.

Turkey became another popular destination for emigrants after Georgian independence, due initially to its geographical proximity; however, its popularity increased after the abolition of a visa requirement for Georgian citizens in 2006 and the closure of the Georgian-Russian border in 2008 (IOM, 2008). The latest available data (CRRC/ISSET, 2010¹) on migration shows that patterns are still changing in Georgia, with Western European countries, particularly Greece, receiving a higher share of labour migrants compared to Russia. According to the Organisation for Economic Cooperation and Development (OECD), the stock of Georgian labour in Greece has increased steadily in the last decade, multiplying almost tenfold to 25 631 Georgians in 2009 (OECD, 2012).

A specific feature of Georgian emigration is the fact that it is largely undocumented and irregular. Accordingly, labour emigrants usually rely on unofficial and often illegal means that can be rather costly. Most migrants are unable to obtain official work permits and mainly work in the black or informal labour markets (IOM, 2000; Badurashvili, 2005; People's Harmonious Development Society and TASO Foundation, 2010).

A small number of Georgians are legally sent to work abroad through private agencies. Since public employment services were abolished in 2006, such private employment agencies and individuals are currently the only suppliers of job-matching services. As no legislation exists that specifically regulates private employment agencies and labour migration, it is impossible to obtain an overall view of their activities, which may be considered as informal, given the non-existence of bilateral agreements between Georgia and other countries. In view of the limited opportunities to legally take up work abroad, companies and individuals organising trips and jobs abroad profit greatly from their activities, as many people are willing to pay to work abroad. No official information on cost is available, but mass media information and informal contacts with individuals who have used these services would indicate a significant cost of between USD 1 500 and USD 5 000.

The best known private employment agency in Georgia recruiting for abroad is called Red Star, which pre-selects candidates for personal interviews with representatives of the employers. Most other private agencies do not identify themselves as private employment agencies². In 2007, the International Labour Organisation (ILO) conducted a study of employment agencies in Georgia, concluding that officially no employment agency exists; rather, vacancies are published online and small numbers of foreign companies employ Georgian citizens or implement cultural or educational programmes abroad (ILO, 2007, p. 11). Thus, it is impossible to find out if any private organisation or individual provides job-matching services for migrants.

¹ Nationally representative migration survey conducted at the end of 2008, part of a six-country study of the relationship between migration and development funded by the Global Development Network. It was based on interviews in 1 500 households in three categories: without migrants, with currently absent migrants and with returned migrants.

² Some negative recruitment practices are known from the mass media, such as when such agencies mediated jobs abroad for Georgian applicants without checking their skills. Such people, not being able to perform the required jobs properly, were left abroad without money or a valid contract and in need for assistance from a Georgian embassy.

Migrant characteristics

Official statistics on annual emigrant flows do not provide information on the socio-demographic characteristics of migrants, while other national and international sources paint inconsistent pictures. This is partially accounted for by the lack of national and international conformity in the definition of 'migrant' and 'migration' and the inability of statistical data collection systems to capture details of irregular and illegal migrants (Bardak, 2011). There is, for example, a significant discrepancy in the percentage of Georgian migrants by sex in the population census of 2002³ (40% women) and in the 2000 and 2010 data (56%-57% women) provided by the UN (2009).

Numerous studies have noted the growing number of women labour migrants from Georgia, particularly among flows going to Europe and the USA. While migration surveys conducted in 2000 to 2002 indicated that women represented between 33% and 40% of the total (Badurashvili et al., 2001; Dershem and Khoperia, 2004; IOM, 2002; IOM and the Association for Economic Education, 2003), a World Bank 2005 survey of returnees estimated a 60% share (CRRC, 2007, p. 47). The feminisation of migration flows in recent years has been noted by many specialists (Hofman and Buckley, 2008; Zurabishvili and Zurabishvili, 2010; Lobjanidze, 2010).

Gender-related preferences for particular destinations explain the prevalence of women in migration flows to Greece and Germany (Lundkvist-Houndoumadi, 2010) and of men among migrants to Russia and other CIS territories, mainly due to physically demanding nature of the job offers there (Badurashvili, 2004). Existing studies all indicate gender differences in work activities in European countries; while Georgian men mostly work in building and construction jobs, women are mainly employed as care-givers for the elderly and as domestic workers in the services sector. This occupational stratification has remained almost unchanged during the whole period. The construction sector is also well represented in the sample of male returnees from Russia (40%), especially in more recent flows, according to official data from the Russian Federal Migration Service. The European Bank for Reconstruction and Development (EBRD) survey on migrant money transfers (EBRD, 2007, p. 4), conducted in Georgia and Russia from December 2006 to February 2007, revealed that most Georgian emigrants worked as unskilled labour in agriculture, industry and the services.

Migration is highly selective in terms of age for Georgians irrespective of destination. Most emigrants (between 70% and 80% according to different surveys) are in the ideal working age bracket, namely, 20 to 50 years; a considerable share (those in their 30s and 40s) belong to able-bodied and skilled and experienced cohorts. The share of migrants aged below 30 years is remarkably high at around 40% (Badurashvili, 2011; Geostat, 2006) among migrants who have ranged further abroad to the EU, the USA and Israel. Georgian emigrants in Germany, France and the UK are distinguished by their relative youth (large numbers of au pair workers and students).

In general, migrants from post-Soviet territories are distinguished by high educational levels. The educational level of Georgian labour migrants is higher than of the Georgian population in general. Georgian migrants with higher education represented 40% of current emigrants and 49.2% of returnees, according to a migration survey conducted by Geostat (2006, p. 16)⁴. Well-educated young women are more likely to migrate to Western European countries and the USA, whereas mainly married and less well-educated men in their 40s tend to go to the CIS countries. The educational differences in migrants by destination are more pronounced among men: the number of emigrants with higher education is as much as twice as high among Georgian men in Western European countries compared to those in CIS countries (Badurashvili, 2005, p. 9).

Going abroad for work requires being well informed about the foreign labour market, having foreign language skills and being flexible in terms of mobility. The well-educated stratum of Georgian society is the main group meeting these requirements as they have the ability to establish contacts in foreign countries and adapt to new environments. Due to limited high-skilled job creation in Georgia, the potential of this group is not exploited and, consequently, they are pushed to go abroad, although the jobs they take up do not usually correspond to their qualifications and experience. Only 5% of female returnees and 20% of male returnees indicated that the work they performed abroad corresponded to their education, according to a survey of 500 returned migrants in Georgia conducted in 2009⁵. More than half of the migrants who with vocational education and training (VET) qualifications worked as service workers or salespersons in shops and markets abroad and one third of technicians and similar professionals were employed as unskilled workers.

Returned migrants bring back skills and habits such as responsibility, discipline, experience of communication, etc.; however, their professional skills do not improve much given the type of unskilled work they do abroad (e.g. domestic

³ During the census a special questionnaire on emigration was completed for each household member who had left for abroad for at least one year. The total of 113 726 emigrants recorded in the census of 2002 was challenged by many critics in Georgia and it was concluded that the questionnaire on emigration was defective. It should be mentioned that the census data for migrants are not far from those for temporarily absent family members given by Geostat's Integrated Household Survey. Thus the figure probably refers to current movements rather than permanent stocks. Another source of bias in the census estimates is related to the fact that the people in entire households that emigrated from Georgia could not be recorded as such in the population census as there was nobody in the dwelling to provide information on them.

⁴ Interviewed in Georgia were a total of 1 006 households (677 households with migrants abroad and 329 households with returnees), under the framework of the GEC1502 project (Reform of Official Statistics, Statistics 8, Armenia, Azerbaijan and Georgia, Ref. EuropeAid/120571/C/SV/Multi (www.dgmarket.com/tenders/np-notice.do~1123526)).

⁵ In the framework of the Volkswagen Foundation's ArGeMi project Comparing out-migration from Armenia and Georgia (www.oei.fu-berlin.de/en/soziologie/forschung/ArGeMi1.html).

work). The irregular status of many labour migrants and the restricted range of jobs available to them contribute to this situation. However, analysis of the incomes of emigrants shows that better educated people earned more than less well-educated people. The ability to better adapt to new social environments abroad along with the capacity to find better-paid jobs seems closely related to the education level of migrants (Badurashvili, 2011).

The emigration process for permanent and temporary labour activity abroad involves different strata of Georgian society and the regions to different degrees. While the available data reflect little difference in emigration rates from rural and urban areas, destinations do differ: migrants from rural areas more often go to Russia or other Russian-speaking countries and those from Tbilisi (more likely to be higher educated) go to Western Europe and North America (CRRC, 2007, p. 27). **TABLE 1.3** provides information on emigrants by regions based on the 2002 population census data.

TABLE 1.3 POPULATION AND EMIGRANTS IN GEORGIA, 2002 CENSUS DATA

| Region | Population (in 000) | Emigrants (n) | Emigrants (%) |
|---|------------------------|------------------|------------------|
| Total | 4371.5 | 113 726 | 2.6 |
| Tbilisi | 1081.7 | 32 793 | 3.0 |
| Adjara | 376.0 | 4 084 | 1.1 |
| Guria | 143.4 | 1 658 | 1.2 |
| Imereti + Racha-Lechkhumi and Kvemo Svaneti | 750.7 | 17 420 | 2.3 |
| Kakheti | 407.2 | 8 773 | 2.2 |
| Kvemo Kartli | 497.5 | 16 561 | 3.3 |
| Mtskheta-Mtianeti | 125.4 | 3 256 | 2.6 |
| Samtskhe-Javakheti | 207.6 | 6 656 | 3.2 |
| Samegrelo-Zemo Svaneti | 468 | 15 872 | 3.4 |
| Shida Kartli | 314 | 6 653 | 2.1 |

Source: Geostat, 2006, p. 8

Regions such as Samegrelo-Zemo Svaneti, Kvemo Kartli and Samtskhe-Javakheti had the largest share of emigrants. Many internally displaced persons (IDPs) from Abkhazia were settled in Samegrelo-Zemo Svaneti after ethnic conflict in the 1990s⁶. This special category of internal migrants shows a higher propensity to migrate than the local population (Nadareishvili and Tsakadze, 2008). Between 1991 and 1993 approximately 300 000 persons were internally displaced due to territorial conflicts in Abkhazia and South Ossetia and in 2008 more than 5 000 families were forced out of their homes when Shida Kartli was occupied by Russia. IDPs in Georgia are often divided into the 'old' and 'new' caseloads. The first figure refers to people displaced in the 1990s and their descendants registered as IDPs as of 2009 (totalling some 233 000 persons). The second figure includes about 17 000 people given IDP status after the 2008 war plus an estimated 5 000 who were formally recognised as such later; most new IDPs are from South Ossetia, and about 3 600 had already been displaced in the 1990s (Walicki, 2011, p. 63).

Kvemo Kartli and Samtskhe-Javakheti in South Georgia are also distinguished by higher emigration rates and are home to 55% of Georgia's ethnic minorities (which also represent more than half of the population of these regions combined). The main ethnic minorities in Kvemo Kartli and in Samtskhe-Javakheti are Azeris and Armenians, respectively. These regions have a long-standing tradition of labour emigration; in Soviet times, male Armenians and Azeris from southern Georgia used to temporarily emigrate to Russia as contract workers (called *shabashniki*), leaving in spring and returning in autumn. A Russian survey of immigrants from Moldova, Georgia and Azerbaijan points to the disproportionately high proportion of remittances sent from Russia to the Samtskhe-Javakheti region of Georgia (EBRD, 2007).

⁶ IDPs are people who were forced from Abkhazia and South Ossetia, two disputed regions with de facto independence in the northern part of Georgia since its independence from the Soviet Union in 1991. The tension between Georgia and Russia over these regions culminated in a war in August 2008. More than 127 000 people fled their homes, adding to the more than 220 000 people already displaced by the same conflict in the early 1990s.

Migration outcomes

Data from the Integrated Household Survey (the official source of information for Georgian poverty, labour force and consumption statistics) indicate that approximately 7% of the resident population of Georgia receives remittances from abroad, corresponding to between 6% and 10% of households with absent labour emigrants. According to the World Bank (2011a), total remittances amounted to USD 824 million in 2010, representing 6.4% of Georgia's gross domestic product (GDP). While remittances comprise 5% of household incomes overall, for households that receive remittances, they represent almost half of their budget. The Integrated Household Survey stated that 9% of adults (approximately 317 000 people) received remittances on a regular basis during 2006; an EBRD survey pointed to some one million people as beneficiaries of remittances (EBRD, 2007). The financial transfers of emigrants constitute somewhere between 20% and 40% of average monthly personal incomes, according to different data sources (Badurashvili, 2004, 2005; Geostat, 2006).

An average remittance recipient receives money eight times a year. The average amount of a remittance ranges between EUR 160 (EBRD, 2007, p. 88) and EUR 220 (Badurashvili, 2011). Recipients spend approximately 85% of this money on basic daily expenses such as food, housing, clothing, utilities and medicine. Extra expenses for sickness, accident, physical disability or childbirth can ruin a household's welfare, even if it does not belong to an especially vulnerable group of the population. Thus, a large share of remittances is spent on the basic needs of families and on improving living standards rather than on business activities. A survey of returnees by the World Bank⁷ confirms this finding, showing that if the remitted amount rises, use shifts from consumption needs to property purchases or renovation (63% of the households receiving remittances spend the money on home repairs). Relatively few respondents reported using remittances to set up or expand a business.

Returnees seem to be reluctant to start a business despite saving reasonable sums; 85% of interviewees managed to save while abroad and the average sum they brought back was EUR 8 470 per migrant (Geostat, 2006). The above-mentioned World Bank survey of returnees showed that only 18% stated their intention to start a business. The lack of enough capital or savings is mentioned as a primary reason for not wanting to start a business (61%); the high cost of entry and no idea where to invest were distant seconds (CRRC, 2007, p. 49).

Available studies provide some indications that returnees experience difficulties in finding a job similar to the one they had before their departure or finding any job at all. For example, the above-mentioned World Bank survey shows that unemployment among returnees was roughly equal to the levels prior to departure, although 42% of returnees who were unemployed before migration found jobs after their return. The survey also shows that returnees who were employed before found themselves unemployed after return. Of those who held senior and/or skilled positions before departing, only about 50% obtained a similar-status job on return and 25%-33% found themselves unemployed. Due to a lack of hard evidence, it is difficult to say whether the Georgian labour market is unable to integrate returnees and make use of skills and knowledge acquired abroad, or whether the migrant is unwilling to enter the Georgian labour market due to specific expectations regarding wages and working conditions.

Some recent research (CRRC/ISET, 2010) has found that an absent migrant in a household changes the income and employment profile of its members significantly. For example, the income of households with returnees is higher countrywide in both urban and rural areas compared to in households with migrants. In Tbilisi there is also evidence that returnees who are employed usually enjoy well-paid jobs. In rural areas, the risk that members of the migrant's (absent or returned) family are unemployed is 10% less compared to the risk of unemployment for members of families with no migrants (CRRC/ISET, 2010).

However, an International Monetary Fund (IMF, 2012) report recently found that remittances increased the reservation wage of the unemployed. Remittance recipients received on average USD 166 monthly in 2010 (USD 246 when employee compensation for Georgians working abroad was included), USD 24 more than the USD 142 subsistence income for an average household in December 2010. Remittances also appear significant when compared with the Georgian average monthly wage in 2010 of USD 335. The IMF data show that urban households with a migrant are more likely to have an unemployed member than comparable households without a migrant.

1.2 LABOUR MARKET TRENDS⁸

Georgia's economic reforms since 2004 have resulted in impressive growth and a substantially improved business climate. The economy stabilised after the severe double crisis of 2008 and performance in 2011 was stronger than originally expected, with GDP growth at nearly 7%. GDP per capita in 2011 (USD 3 215.4) surpassed the pre-crisis level, after a notable decline registered in 2009-2010 (Geostat, 2011a, 2012c). However, the country continues to face

⁷ The data here are calculated from the database of this World Bank survey of 1 200 returnees conducted in 2005 in the framework of an international project titled 'Enhancing Gains from International Migration in Europe and Central Asia'.

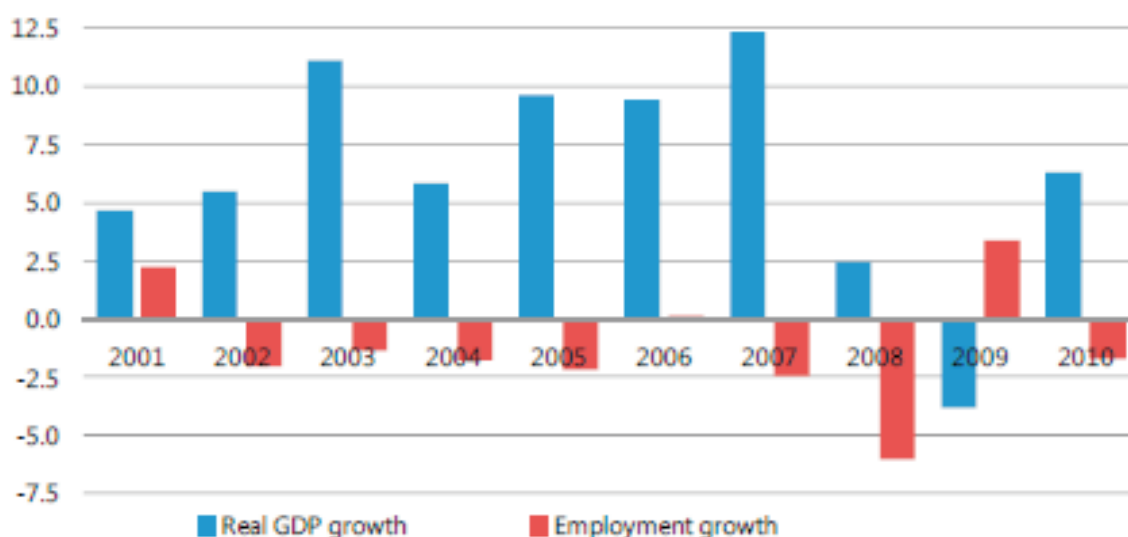
⁸ This section largely draws on information from Bardak (2011) and ETF (forthcoming).

important challenges, namely low job creation, persisting high unemployment and underemployment, a high share of self-employment in subsistence agriculture and high poverty, all in a decade of robust economic growth averaging 6% annually.

Real GDP growth has resulted mainly from increased labour productivity in certain sectors and related real wage growth. In parallel, large shares of the workforce – those working in the low-productivity rural economy and in subsistence farming and the unemployed – have not made gains from productivity growth and the market economy (**FIGURE 1.1**). The rural economy overall has not responded to the improved economic environment to same extent as the urban economy and inequality between rural and urban incomes is growing.

According to the Geostat (2012d), the average monthly income per capita (total cash and non-cash inflows) in urban areas is around 25% higher than in rural areas. Although poverty incidence was reduced by 5.8% over the last five years, this was not proportionate to economic growth (World Bank, 2011b). The well-functioning programme of targeted social assistance launched in 2006 was largely responsible for improving living conditions in 2007 and 2008, particularly among the very poor; coverage was further expanded in the wake of the crises of 2008. However, more active policies that fully integrate the poor and rural population in the growth process are necessary to counter the structural problems of employment and unemployment.

FIGURE 1.1 REAL GDP AND EMPLOYMENT GROWTH IN GEORGIA, 2001-10 (%)



Source: IMF, 2012, p. 18

Both activity and employment rates⁹ have improved slightly since 2008, reaching 65.2% and 55.4% respectively in 2011 (**TABLE 1.4**). Despite these improvements, the Georgian labour market is featured by a large share of self-employment in subsistence agriculture and by structural unemployment. In 2011 only 38% (632 000 people) of the total employed population were wage earners, whereas nearly two thirds (62%) were considered to be self-employed, although mainly represented by subsistent farmers. In fact, 47% of the population was rural in 2011. The gap between urban and rural areas has widened since the Rose Revolution of 2003; most of the poor live in rural areas, as indicated by the higher poverty incidence¹⁰ (24.3%, versus 17.4% in urban areas in 2009). Labour market indicators have not improved in the last decade despite a fall in the labour force by 5% between 2000 and 2010 (Bardak, 2011; and ETF, forthcoming).

⁹ According to Georgian official statistics, the employment rate is the number of employed people expressed as a percentage of the national population aged 15 and older. An unemployed person is defined as a person aged 15 or above, who was not employed (even for one hour) in the seven days prior to the interview, who had been looking for a job for the previous four weeks and who was ready to start work within the next two weeks; and an employed person (hired or otherwise) is defined as a person aged 15 and older who worked in the seven days prior to the interview (for at least one hour) to generate income (salary, profit or other compensation in kind) or who helped other household members for free or who was formally considered employed but did not turn up for work. See www.geostat.ge/cms/site_images/_files/english/methodology/labour%20force%20statistics%20Eng.pdf.

¹⁰ The poverty line was constructed based on observed consumption baskets in a World Bank Living Standards Measurement Study: GEL 71.6 and GEL 47.1 per person per month were estimated as the upper and lower poverty lines (World Bank, 2009b).

TABLE 1.4 EMPLOYMENT INDICATORS IN GEORGIA, 2003-11 (%)

| Year | Employment | Unemployment | Economic activity |
|------|------------|--------------|-------------------|
| 2003 | 58.6 | 11.5 | 66.2 |
| 2004 | 56.7 | 12.6 | 64.9 |
| 2005 | 55.2 | 13.8 | 64.0 |
| 2006 | 53.8 | 13.6 | 62.2 |
| 2007 | 54.9 | 13.3 | 63.3 |
| 2008 | 52.3 | 16.5 | 62.6 |
| 2009 | 52.9 | 16.9 | 63.6 |
| 2010 | 53.9 | 16.3 | 64.2 |
| 2011 | 55.4 | 15.1 | 65.2 |

Notes: Data refer to the population aged 15 years and older. Labour market status is as defined by the ILO.
Source: Authors, based on Geostat data (http://geostat.ge/cms/site_images/_files/english/labour/new/)

As two thirds of employment is rural self-employment, it is not surprising that rural unemployment rates are much lower. However, unemployment has steadily increased since 2000 (15.1% in 2011), with the highest rates occurring among people with higher education, young people and urban populations. **TABLE 1.5**, which shows a gradual increase in the youth unemployment rate, peaking at almost 36% in 2011, reflects the difficulties encountered by young people when entering the labour market. Tbilisi tops the unemployment rate by region (twice the country average), while rural regions display one-digit unemployment rates, seemingly at odds with the prevailing higher poverty rates in these regions. Despite all the efforts to develop an agricultural infrastructure, the main problems remain unresolved: the lack of agricultural equipment, poor quality and expensive fertilisers and chemicals, undeveloped irrigation systems, poor quality seeds and a limited knowledge of agricultural technology. All these factors are further exacerbated by gradual decreases in cultivated areas and in average harvests (USAID and IOM, 2010, p. 9).

TABLE 1.5 YOUTH UNEMPLOYMENT IN GEORGIA, 2005-11 (%)

| Year | Total | Men | Women |
|------|-------|------|-------|
| 2005 | 28.3 | 26.6 | 30.6 |
| 2006 | 30.0 | 29.2 | 31.2 |
| 2007 | 31.5 | 28.1 | 36.8 |
| 2008 | 35.5 | 32.4 | 40.7 |
| 2009 | 38.7 | MD | MD |
| 2010 | 36.3 | MD | MD |
| 2011 | 35.6 | MD | MD |

Notes: Data for the population aged 15 to 24 years. MD – missing data.
Source: Geostat, 2012d; Index Mundi, 2011

Business sector employment (**TABLE 1.6**) reflects trends better and illustrates falling numbers of employees since 2005. However, a recent business survey (Geostat, 2012a) shows a reverse employment trend; according to this survey, the largest employers are industry (25%), trade and repair services (18%), health and social work (14%), transport and communications (13%) and construction (9%). Despite its strategic appeal for the government, the hotel and restaurant sector (largely linked with tourism) has a small share in employment (4%). Within industry, the lead employers are food products, beverages and tobacco, followed by electricity, gas and water supply enterprises.

TABLE 1.6 BUSINESS SECTOR EMPLOYMENT IN GEORGIA, 2003-09

| Year | Total employment | Of which | | | | |
|------|------------------|---------------|----------------|-------------------|--------------------|-------------------|
| | | Public sector | Private sector | Large enterprises | Medium enterprises | Small enterprises |
| 2003 | 297 795 | 138 977 | 158 818 | 147 239 | 69 390 | 81 166 |
| 2004 | 322 779 | 144 442 | 178 337 | 169 883 | 70 454 | 82 442 |
| 2005 | 388 946 | 145 063 | 243 883 | 200 903 | 87 628 | 100 415 |
| 2006 | 360 987 | 107 011 | 253 976 | 192 242 | 84 192 | 84 554 |
| 2007 | 361 209 | 95 608 | 265 601 | 201 748 | 91 784 | 67 677 |
| 2008 | 349 250 | 83 239 | 26 6011 | 209 532 | 74 443 | 65 276 |
| 2009 | 315 162 | 79 844 | 23 6709 | 196 124 | 62 842 | 57 587 |

Note: Excluded are employees in the financial intermediation and public administration sectors, housemaids, self-employed persons producing goods and services for their own consumption and employment figures for exterior organisations, non-commercial legal entities of private law and legal entities of public law.

Source: Geplac, 2009

High levels of underemployment and informality also affect other sectors, notably the highly seasonal restaurant and hotel business and repair services (GIZ, 2010). The rather broad definition of employment hides high numbers of underemployed people and underestimates the real number of unemployed people. For example, Geostat defines a self-employed person as anyone who worked for at least one hour on their own plot in the previous week or was fishing, hunting, sewing, picking berries, mushrooming, preserving or canning food (IOM Job Counselling and Referral Centre, 2009). Such a broad criterion for employment artificially reduces the share of unemployment and increases the number of self-employed persons. If underemployment is excluded, experts calculate a real unemployment rate of 30%-35% in Georgia (ILO, 2010, p. 44).

At the same time, the labour market has a skills shortage and lacks quality labour, with a gap between demand and supply even in a situation of mass unemployment because of the lack of qualified personnel for certain professions (IOM Job Counselling and Referral Centre, 2009, p. 3). According to a survey of Georgian employers (USAID and IOM, 2010)¹¹, skilled and qualified workers (two in three vacancies) are in most demand but difficult to find. The most in-demand professions are accountants, bakers, welders and electricians. The difficulty of finding skilled workers is exacerbated by geographically specific shortages in specific sectors. More than one third of business owners encounter problems with locating or attracting staff. The reasons given are the few properly trained professionals, low geographical mobility and low salaries. The dissatisfaction with the skills and qualifications of employees reflects the need to improve training quality. For example, none of the specialties in agriculture has enough practitioners. Leaving aside the low number of students enrolled in agricultural VET courses, particularly lacking in this field are agronomists, veterinarians, agricultural machinery operators and mechanics, plant protection specialists, agricultural engineers, agricultural technicians, agricultural chemists, animal technicians, breeding specialists, veterinary assistants and soil scientists (USAID and IOM, 2010, p. 37).

Regarding the background to the labour market, the new labour code adopted in 2006 was considered to be among the most liberal in the world. It radically increased labour market flexibility and the power of employers in industrial relations (ILO, 2010, p. 45). The employment law and the public employment services were abolished, based on the idea that employment was to be organised by the free market itself. Although this was a policy response to high unemployment and a large informal economy, the impact on job creation is still not clear. The labour code provides for very flexible hiring and firing conditions for employers, does not regulate working hours and conditions and does not oblige

¹¹ The survey was based on 4 500 interviews with representatives of all types of economic organisations and enterprises, including individual entrepreneurs and farmers.

employers to remunerate overtime work. The social protection of workers and health insurance coverage has become an acute issue due to the gaps in the legislation (e.g. regarding accidents at work), as confirmed by a European Commission study (2011, p. 8).

Currently 25% of people from different categories (civil servants, teachers, military and vulnerable groups like those living below the poverty line and IDPs and, from 2012, students) are covered by the state health insurance system, and another 15% of the Georgian population is covered by voluntary health insurance under the private health insurance system. The results of the 2006 labour code have been disappointing from a social protection point of view also, since employment for most people today is characterised by precariousness, poor pay and instability of earnings in low-productivity sectors and by an inadequate social protection system for workers (USAID and IOM, 2010, p. 12).

Considering these tough labour market conditions, migration offers an opportunity to improve a family's economic situation thanks to remittances from abroad. Poverty, unemployment, underemployment, low wages and poor working conditions seem to be key determinants of labour migration. Different migration surveys confirm that most labour migrants go abroad because they cannot find a job or have no possibility for self-realisation at home. The government's liberal policy of minimal labour market interference (and inadequate employment regulation) also renders those in employment vulnerable and acts as a new push factor for labour migration, motivating people to look for better jobs abroad. It also may create obstacles for the sustainable return of emigrants with new skills acquired abroad as these people will have adapted to European-style social and labour environments.

As the government does not consider labour market management necessary, a lack of proper public institutions may create an obstacle for effective management of labour migration, in particular for the development of measures to facilitate circular migration. Currently there are signs that the government might recognise the shortcomings of its existing labour market policy. In October 2011 the government adopted a ten-point plan for the modernisation of employment in 2011-2015, the focus of which is primarily on improving the economic and business environment (Government of Georgia, 2011a). Established in mid-2012 was a new ministry for employment, which presented another six-point action plan, the first step of which was to create and analyse an unemployment database and carry out tests on unemployed persons to define the type of training they needed. The plan is also to introduce the legal status of 'unemployed'. Uncertainties remain, however, about the capacity of this new small ministry to deal with the complex area of employment.

1.3 EDUCATION AND TRAINING

As can be seen from Annex 1, describing the Georgian education system and equivalences with International Standard Classification of Education (ISCED)¹² levels, the education system (as reformed in 2004, 2007 and 2010) includes nine years of compulsory education (primary and basic) followed by secondary general (three years) or by VET (three levels accessible from basic education). VET continues at higher levels (IV and V) but currently the permeability between VET and higher education is limited due to structural barriers. This problem impacts negatively on the attractiveness of higher-level VET for young people.

The Georgian population has a relatively high level of education; around 35% of the population is high skilled (ISCED 5-6), 52% is medium skilled (ISCED 3-4) and 13% is low skilled (ISCED 1-2). Enrolment in pre-school education is 63% and is almost universal in primary and basic (lower secondary) education. The enrolment rate for upper secondary education was 81% in 2009, however, lower than in neighbouring Caucasus countries (UIS, 2011). The overall quality of education delivered at schools has been negatively impacted by expenditure levels. Public expenditure on education as a percentage of GDP has been low for years, ranging between 2.5% of GDP in 2005 and 3.2% of GDP in 2009. Similarly, public expenditure on education as a percentage of total government expenditure varied between 8.8% in 2005 and 7.7% in 2009.

The share of enrolment in VET is currently difficult to estimate due to incomplete statistical data. Georgia has 14 authorised public and 71 private providers, but since the statistical system is in reconstruction the data available refer only to public VET providers. Annually around 6 000 students enrol in public VET colleges, which is a fraction (13% in 2011-2012) of total students enrolled in the first year of upper secondary education. Public expenditure on VET constitutes a very small part of the education budget. The share of VET financing in the regular education ministry budget in 2012 is only 1.4%, while the total VET financing share is around 4%.

Higher education enrolment has been somewhat limited in Georgia since 2005. A process to accredit higher education institutions was initiated in 2004 following a period of substantially increased enrolment in higher education that had come to endanger the quality of provision. This had an immediate impact on enrolment which fell dramatically. The gross enrolment rate decreased from 46% in 2005 to around 35% in 2010. Georgia also joined the EU Bologna Process in 2005 and wants to participate actively in the creation of the European Higher Education Area. The negative reputation of universities is gradually being overturned as a result of quality assurance reforms.

¹² For more information on ISCED, see www.uis.unesco.org/Education/Pages/international-standard-classification-of-education.aspx.

During the transition period, special difficulties were encountered by young adults in VET but without a proper choice in terms of education quality and available professions. Given the reduced labour demand during this time, most higher education institutions (numerous in the 1990s) were providing education on restricted lists of so-called 'prestigious' professions for almost everyone in a position to pay. The majority of these graduates were not properly trained and even many of those who graduated from the best universities did not manage to find appropriate jobs due to reduced labour demand.

Those who did not migrate created serious pressure on the labour market. Non-experienced young specialists with uncompetitive 'prestigious' qualifications were ready to accept any job due to the high unemployment rate. Even the best graduates took positions not appropriate to their studies mainly motivated by the need to earn an income. Some who were lucky enough to start working in dynamic sectors such as banking and computing managed to acquire new skills and a higher level of professional experience and status in their new career. But most 'victims of transition' ended up working below their qualification level, often in temporary jobs and without perspectives for a career. Many are currently self-employed in trade with a high probability of being underemployed, falling into debt, etc.

Hence, many educated people are at high risk of emigration due to limited opportunities, especially those with experience from Soviet times who have lost jobs due to outdated skills and those educated in the transition period who have not managed to improve their basic (poor quality) vocational education due to limited employment opportunities. The labour market currently requires professionals with suitable qualifications and skilled and technical workers, for which tertiary education is not required. Furthermore, temporary labour migration does not seem to reduce the oversupply of labour; according to available studies, labour migrants remain abroad for two to three years (Geostat, 2006; CRRC/ISSET, 2010), then return and join the ranks of the unemployed.

TABLE 1.7 shows labour market participation according to education level. The poor performance of higher education is partly justified by the small share of productive jobs that are more likely to require better educated people. The unemployment rate for people with higher education has increased steadily and is higher than for other education levels (20.5% in 2011). Employment rates linked with higher education improved very slightly, but remain lower than those for vocational education. Better educated people wish to find jobs relevant to their education with good employment conditions but the market is failing to create such jobs. Young people are less likely than their elders to settle for a job in this 'secondary market' of poorly paid jobs with poor working conditions that are not perceived to be relevant to the education they received. The second biggest group among the unemployed is secondary education graduates. The interpretation suggested by these data points to the quality and type of education.

TABLE 1.7 EMPLOYMENT AND UNEMPLOYMENT BY EDUCATION LEVEL IN GEORGIA, 2008-11 (%)

| | Education level | | | | | | | |
|--------------|-----------------|-------|-----------|--------------------|----------------------|--------|--------------------------------|------------|
| | Primary | Basic | Secondary | Primary vocational | Secondary vocational | Higher | No education/ unknown level | All levels |
| Employment | | | | | | | | |
| 2008 | 44.3 | 35.5 | 53.1 | 69.0 | 57.8 | 55.5 | 20.2 | 52.3 |
| 2009 | 37.8 | 33.9 | 53.2 | 70.0 | 58.3 | 57.8 | 17.7 | 52.9 |
| 2010 | 38.2 | 32.4 | 54.3 | 69.3 | 60.0 | 58.9 | 27.5 | 53.8 |
| 2011 | 38.4 | 29.7 | 56.8 | 74.5 | 61.4 | 59.2 | 47.1 | 55.4 |
| Unemployment | | | | | | | | |
| 2008 | 1.4 | 9.8 | 14.5 | 11.2 | 17.4 | 22.2 | 4.7 | 16.5 |
| 2009 | 1.8 | 10.0 | 15.8 | 11.9 | 17.8 | 20.7 | 2.4 | 16.9 |
| 2010 | 2.7 | 11.4 | 15.2 | 12.3 | 15.3 | 20.9 | 1.2 | 16.3 |
| 2011 | 3.5 | 10.4 | 13.7 | 10.3 | 13.4 | 20.5 | 0.8 | 15.1 |

Source: Geostat, in response to a request by the ETF (August 2012)

The current scarcity of medium-skilled workers is the result of a policy decision in the 1990s to reduce investment in VET, which led to numbers plummeting in the next 20 years. The VET system has been greatly affected by the transition process; traditionally it prepared large cohorts of young people for mostly manual jobs in large public enterprises, but with the closure of most of these enterprises, the training offered became obsolete. In Georgia as in other ex-Soviet countries, a big reduction followed in the number of schools providing VET and in the number of VET students. To solve these problems the government recently took steps towards developing an appropriate VET system. The process of European integration and expectations for circular migration opportunities have also raised the importance of issues related to meeting European education and VET standards.

The government is aware of growing demand for qualified and competitive human resources in the domestic and foreign labour markets. It is noteworthy that the national VET strategy for 2009-12 included the following among its objectives (Government of Georgia, 2011b): (i) provision of internal and international markets with competitive labour; (ii) advancement towards inclusion of the Georgian VET system in the European and international educational space; (iii) support for individual self-realisation; and (iv) social welfare support for individuals. Measures to date to rebuild VET have resulted in the rehabilitation of ten VET institutions, the adoption of a VET law in 2010, the development of a VET strategy for 2009 to 2015 and progress towards the development of professional standards and the improvement of VET programmes. Overall, positive trends have been observed in the VET area, although there remains a need to enhance the focus on the labour market and to improve training quality. The existing system of VET institutions, with very limited educational facilities, is still unable to cope with the dynamic developments in certain economic sectors. Experts¹³ mention, as particular issues, the continuing problems of low funding from the state, the inadequate material and technical base for VET institutions, the unprepared and unqualified nature of VET teachers, quality assurance problems, low involvement by social partners and the lack of attractiveness of VET.

Despite efforts to better link VET programmes with labour market needs, notably by associating VET curricula with occupational standards and involving better structured employer groups in the design and review of occupational standards, the offer of VET qualifications shows important gaps relative to the qualifications in demand by the market. This gap is particularly wide in respect to qualifications for sectors with growing employment prospects, such as utilities (electricity, gas, water and sewage), mining and processing, chemicals and pharmaceuticals, rail and logistics (GIZ, 2010). The mismatches between VET supply and qualifications and in demand skills are especially severe in Tbilisi and in the ports of Poti and Batumi. The non-implementation of validation systems for non-formal and informal learning, despite the basic legislation being in place since early 2011, further affects this situation negatively.

The liberalisation of entrepreneurial activities provides a real opportunity for the creation of new jobs and will give a certain category of job seekers good opportunities for entering the labour market and obtaining employment. However, training for entrepreneurship is not sufficiently developed in the formal primary, secondary or tertiary education system and entrepreneurship in general needs more systematic support through a comprehensive package of coaching, training and loans for young would-be entrepreneurs.

1.4 MIGRATION POLICIES AND INSTITUTIONS

According to Ademmer (2011, p. 11), Georgia displayed patterns of inertia until late 2009 and complied only selectively with migration-related European Neighbourhood Policy rules, signing just six readmission agreements with EU member states or members of the Schengen Agreement. The European Commission expressed its dissatisfaction with Georgian migration policy in its progress report of 2008, criticising the lack of a written policy document and the extremely liberal nature of the unwritten migration policy. The situation of inertia has gradually changed since a Joint Mobility Partnership agreement between Georgia and the EU was signed in November 2009¹⁴ and since a European Commission readmission agreement for migrants was signed in 2010 that took effect in 2011 (Ademmer, 2011, p. 12).

Georgia currently does not have a written migration policy document. The existing legislation governing migration issues consists of a number of laws, regulations and instructions describing the rights of nationals, foreign nationals and stateless persons and regulating entry, residence, return and irregular migration. National migration legislation also relies on legal acts for other branches of law, e.g. administrative or criminal law, to ensure the prevention and prosecution of offences and crimes associated with migration.

The main institutions dealing with migration management are the Ministry of Justice, the Ministry of Foreign Affairs and the Ministry of Internal Affairs and its Border Police, the Ministry of Internally Displaced Persons from the Occupied Territories, Accommodation and Refugees (Midpocra) and the Ministry of Labour, Health and Social Affairs. However, none of these institutions has a clear coordinating role in migration management nor do rules exist regarding the sharing of tasks between existing agencies dealing with migration and with migration management competences.

¹³ Based on discussions from the international conference on 'Skills Validation for Returned Migrants under the Mobility Partnership', held in Chisinau, Republic of Moldova, 10-11 November 2011.

¹⁴ See europa.eu/rapid/press-release_IP-09-1853_en.htm. More information on the Joint Mobility Partnership is given in Section 1.5 below.

Following restructuring of the Ministry of Labour, Health and Social Affairs, there is currently no state entity dealing specifically and full-time with labour migration. Midpocra is most actively involved in the daily management of migration issues, given that it deals with the most vulnerable groups of IDPs and also provides assistance to potential migrants who apply to its regional centres.

In July 2007 a new migration division was created within the Directorate on Migration, Asylum and Repatriation attached to Midpocra. Its task is to monitor migration flows and prepare a migration policy along with implementation measures in cooperation with other ministries. Although a draft policy paper was prepared and presented to the prime minister in July 2008, no further progress towards adoption has been made. Midpocra has also hosted the Targeted Initiative for Georgia, the main EU-funded project implemented within the EU-Georgia Mobility Partnership. A mobility centre was created in 2011 to support the reintegration of returnees and the implementation of the EU-Georgia readmission agreement for migrants.

Another important actor is the Ministry of Justice and its Civil Registry Agency, in charge of reviewing and resolving migration issues. The responsibilities of the latter have grown significantly since October 2010, when a Migration Commission was set up under its auspices; its small size and few human and financial resources, however, prevent it from playing an effective role. The Migration Commission is a government advisory body for both immigration and emigration policies. It also coordinates implementation of visa facilitation and readmission agreements with the EU. Its main goal is to coordinate the migration management activities of different bodies; however, this is likely to be a difficult task to implement, due to its limited capacity and excessive number of functions. A total of 12 institutions are represented in the State Migration Commission, including several ministries (labour, education, health, justice, internal affairs, foreign affairs, refugees and IDPs and diaspora), the prime minister's office, Geostat, the police, trade unions and employer associations. It meets three times a year and coordinates working groups on stateless persons, migration strategy and returnee reintegration. Developing a migration strategy and setting up a unified migration database (as a migration information analytical system) were specified as priorities, but results in these areas remain to be achieved.

The government has, in recent years, sought to rebuild ties with Georgian diaspora communities and to build stronger cultural ties with labour migrants abroad. An Office of the Ministry for Diaspora Issues was created in 2008. A number of diaspora organisations have emerged, but they have limited capacity and tend to be organised around informal social networks; their main functions are limited to local cultural activities, charity and advocacy of Georgia. To date, no evidence exists of large-scale economic activity, although the diaspora is becoming increasingly active in terms of new business opportunities.

It must be emphasised that there is still no coherent system in place to collect and analyse migration data and data exchange mechanisms between institutions dealing with migration are defective. There is a lack of accurate information on the number of labour migrants, both legal and illegal, and the absence of a proper system for compiling migration statistics hinders the development of effective migration management policies.

1.5 BILATERAL/MULTILATERAL AGREEMENTS AND JOINT MIGRATION INITIATIVES

Due to liberal approach of the government on the management of labour market and lack of relevant state structures, facilitating labour migration is not considered necessary and willingness is low to assume measures for the facilitation of circular migration. This has slightly changed in November 2009 when Georgia signed a Joint Mobility Partnership declaration with the EU and 16 EU member states¹⁵. The signed mobility partnership has three pillars: (i) mobility, legal migration, integration and asylum; (ii) migration and development; and (iii) fight against illegal migration and trafficking in human beings. One important element of the mobility partnership is to improve the opportunities of and benefits from migration. Within the context of the mobility partnership, France was the first country to offer Georgia the conclusion of a bilateral agreement on circular migration, which would provide possible employment for 500 persons per year under a short-term scheme. However, the signing of the agreement that was planned for October 2010, has not taken place yet.

While bilateral agreements for labour migrants would be beneficial to all engaged parties, the government has been reluctant about establishing them even with the top destination countries of Georgian migrants such as Greece, Turkey and others (CIPDD, 2009). Hence, today Georgia does not have labour agreement signed with any country. This situation severely affects the social security coverage of the migrants and their families in a long run. They are generally not covered by any social security system both abroad and at home, and this will pose serious risk when they get older. Even if few Georgian emigrants are covered by social security schemes abroad, the absence of portability of pension schemes will raise another problem in the future.

In 2010 the government started paying attention to policy development that would facilitate legal migration and reintegration of returnees. It considers the return process as a factor contributing to the formation of a middle class and

¹⁵ For the full text, see www.consilium.europa.eu/uedocs/cms_data/.../111580.pdf.

so wants to promote the sustainable return of individuals and the efficient use of returnees' potential and experience in social development. Due to the great flexibility in starting businesses in Georgia, it is expected to attract emigrants who have accumulated some money and want to return. The government recently offered large investors free land for building large hotel complexes in targeted tourist areas and has pledged not to tax these lands for 15 years.

Another example of exploitation of the potential of diaspora is the 'Back to Georgia' business-conference organised in September 2011, by the Office of the Ministry for Diaspora with the support of TBC Bank, which, with other partner organisations, presented several large projects being implemented in Georgia (Lisi Development and its Green City, Tbilisi and National Tourism Agency projects, etc.) to Georgian business people from different countries, foreign investors and chamber of commerce representatives. The aim of the conference was to showcase an improved business climate and encourage Georgian business people living abroad to participate and invest in the development of the Georgian economy.

An intention to stimulate circular migration has been openly expressed by the government, which states that Georgia is concerned to facilitate 'legal labour movements including agreements on labour and circular migration opportunities' and prioritises 'projects related to the exchange of information concerning the labour market and related legislation' (Office of the State Ministry for European and Euro-Atlantic Integration, 2010). However, it is not clear which governmental structures will play roles regarding these issues. There are also the issues of the recognition of diplomas and job placement services for which no state structure is available.

Contrasting with the few public initiatives, a number of migration management projects are funded and implemented by international donors and organisations. The EU-funded Targeted Initiative to Support the Reintegration of Returned Migrants and the Implementation of the EU-Georgia Readmission Agreement Project is one such project within the framework of the EU-Georgia Mobility Partnership. A three-year project with a budget of EUR 3 million, it is implemented by the Czech Republic in conjunction with eight other EU member states. Its main aims are to strengthen migration management and increase the capacities of authorities to support sustainable return and reintegration and to address challenges posed by irregular migration. It has three pillars: (i) migration policy development; (ii) reintegration of returned migrants (counselling, guidance, VET training and business start-ups); and (iii) dissemination of information on what the mobility centre offers consulates and migrants abroad¹⁶.

The IOM has the longest history of implementing migrant return and reintegration programmes in Georgia. Its activities, which have been funded by different international donors in different time periods, have involved many initiatives to assist returned migrants since 2003. To maximise the integration of returnees by increasing employment opportunities, the IOM has established an employment facilitation network consisting of seven job counselling centres¹⁷ in Tbilisi (June 2007), Batumi (September 2008), Kutaisi, Poti, Akhaltsikhe, Gori and Telavi (June 2010), strategically located to target the highest possible number of beneficiaries. However, most efforts are directed towards rejected asylum seekers and returnees; the scale of initiatives overall is limited for lack of awareness and the small number of countries involved. A more detailed overview of existing projects in this area is provided in Annex 2.

¹⁶ Since 2011, migrants can make an online application to the Mobility Centre for Targeted Initiative Georgia. According to Bela Hejna, director of the project, the centre has received 150 clients and 80 of them have received some kind of intervention. Half of the clients were forced returnees and the other clients were voluntary returnees. Two job counselling and placement centres have been established in Tbilisi and Kutaisi to serve returnees; they aim to reach 1 100 beneficiaries and provide training for 400 people until December 2013. See www.informedmigration.ge.

¹⁷ Note that there are two such centres: job counselling and referral centres (supported by Polish and Czech cooperation bodies) and job counselling and placement centres (supported by USAID). As each has different donors and limited project funds, they have problems of sustainability. In the absence of public employment services in Georgia, however, they fulfil important functions.

2. STUDY METHODOLOGY

The following actions were performed in order to implement the migration and skills project for Georgia and conduct the survey.

Stage 1. Fact-finding mission and discussions with research team and national stakeholders

The fact-finding mission was organised jointly by BCG Research and the ETF. Meetings were held with various stakeholders actively involved in the migration field, such as state agencies, local non-governmental organisations (NGOs) and donor organisations, so as to ensure that various views and experiences were reflected in the analysis.

Stage 2. Existing migration research review and legal and political framework analysis

A migration expert carried out a comprehensive review of the migration situation in Georgia, including a review of the existing regulatory/legislative framework (as presented in Chapter 1), and also reviewed legal documents, international documents (ratified international treaties, codes, laws, governmental decisions, etc.), research reports and statistics on migration.

Stage 3. Sampling, survey implementation and survey results analysis

BCG Research developed a sampling frame and selected a sample consistent with the strategy outlined in the project proposal and agreed with the ETF. Questionnaires were pre-tested in Tbilisi and nearby areas. Cross-country consistency in translation was checked and also the adaptation of the ETF survey methodology to the country context (ISCED classifications and fields adjusted to the national systems and occupational coding according to the International Standard Classification of Occupations (ISCO) guidelines). BCG Research then prepared an implementation manual, including show cards and other relevant materials. Interviewers were trained using the implementation manual during a two-stage training programme in Tbilisi and in the regions. The survey was conducted through face-to-face interviews in 4 000 households between 31 October and 15 December 2011. BCG Research implemented quality control checks on 20% of the interviews during fieldwork once the fieldwork was finished. Sampling and interviewing procedures were carefully checked. No major infringements were detected; for some minor issues, the Tbilisi office was informed, the data were discarded and the corresponding interviewers were replaced with trained back-ups.

Survey results were submitted in two parts. The first part included a technical report covering the survey methodology and implementation (covering problems encountered in the field, possible sampling biases and other observations/experiences), two cleaned and finalised datasets in SPSS format and tables with frequencies and cross-tabulations. The second part referred to the analysis of survey findings.

2.1 TARGET GROUPS AND QUESTIONNAIRES

The survey covered two target groups in Georgia: potential migrants and returned migrants (including both short-term and long-term returned migrants¹⁸). Interviews were face-to-face (paper-and-pencil interviewing method). For the purposes of the survey, a potential migrant was defined as citizens aged between 18-50 years old. The group of potential migrants was further broken down into people who intended to migrate (prospective migrants) and people with no intention of migrating (non-migrants). The survey of potential migrants was thus representative of the adult population (18-50 years) as a whole with a sampling error of no more than +/-2.5% (5%). A returned migrant was defined as anyone who left Georgia aged 18 or over, worked at least three months continuously abroad, came back within the last ten years and is now present and available for interview.

Two separate questionnaires were used for the surveys of the target groups. The potential migrant questionnaire had 100 questions (educations, skills and socio-demographic characteristics, work experience (status, type, level, workplace, sector), intentions and propensity to migrate, expectations from migration and economic and living conditions of the household) and the returned migrant questionnaire had 130 questions (education, skills and socio-demographic characteristics, migration history (including work and training experiences), experiences and economic activity on return, intentions regarding future migration and economic and living conditions of the household).

¹⁸ According to UN definitions, a long-term migrant is a person who moves to a country other than that of his or her usual residence for a period of at least a year and a short-term migrant is a person who moves to a country other than that of his or her usual residence for a period of at least three months but less than a year. The place of usual residence is then defined as the country in which a person lives, i.e. the country in which he or she has a place to live where he or she normally spends the daily period of rest.

2.2 SAMPLING PRINCIPLES

The survey was conducted with 4 000 respondents selected from the whole country. The population census of 2002 was used to select the sample. According to the census, there are 16 000 census units in Georgia each containing 80 households. Three-stage cluster sampling with pre-stratification was performed. In the first stage of sampling, the entire sampling volume was distributed proportionally to the total population (aged 18-50 years) residing in Georgia's 11 administrative regions. Each region was divided into an urban stratum and a rural stratum. The sampling volume determined for a region was distributed in strata in proportions to the population (aged 18-50 years) residing there, despite the fact that there was no upper age limit for returnees (aged 18+).

The primary sampling units for the urban areas were defined in terms of census districts in cities and villages in rural strata. The number of primary sampling units to be selected in a stratum was calculated in such a way that 10 interviews were conducted in each selected cluster – seven interviews in urban areas/six interviews in rural areas with potential migrants¹⁹ and three interviews in urban areas/four interviews in rural areas with returned migrants (**TABLE 2.1**). A total of 400 primary sampling units were selected nationwide using the probability-proportional-to-size method. The secondary selection unit was the household, selected according to the random walk principle, and the final selection unit was the respondent, selected according to the last birthday principle.

The proposed sampling procedure ensured generalisation of the potential migrant survey both in urban and rural areas and in areas with high and low migration (**TABLE 2.2**). The sample is also largely representative at the national level in terms of sexes and three broad skill levels: low (ISCED 1-2); medium (ISCED 3-4); and high (ISCED 5-6). See Annex 3 for 2002 census data on the sex, education and rural/urban breakdown of the population aged 18-50 years.

TABLE 2.1 NUMBER OF INTERVIEWS BY PRIMARY SAMPLING UNITS

| | City | | | Village | | | Sampling principle |
|-----------------------------------|-------------------|------|------------------|-------------------|------|------------------|--------------------|
| | Interviews in PSU | PSUs | Total interviews | Interviews in PSU | PSUs | Total interviews | |
| Potential migrants | 6 | 201 | 1 200 | 5 | 199 | 1 000 | Random |
| Potential migrants with ISCED 1-2 | 1 | | 200 | 1 | | 200 | Snowball |
| Returned migrants | 3 | | 600 | 4 | | 800 | Snowball |
| Total | 10 | | 2 000 | 10 | | 2 000 | |

PSU – primary sampling unit.

As for returned migrants, an additional snowball method was used to find the required number of respondents for this subgroup. Since the sample of returned migrants was not probabilistic, it should be borne in mind that it is not representative as a large share of migrants were not in the country during fieldwork.

¹⁹ In the group of potential migrants, the number of interviews was not sufficient to draw precise conclusions by sex so additional interviews had to be conducted. More specifically, within each cluster, at least one interview had to be conducted with a potential migrant respondent in the ISCED 1-2 group. Other respondents were selected randomly (see Table 2.1).

TABLE 2.2 INTERVIEWS BY REGION

| Region | Number of interviews | | | Sampled PSUs | | |
|-------------------------------|----------------------|--------------|--------------|--------------|------------|------------|
| | Urban | Rural | Total | Urban | Rural | Total |
| Tbilisi | 1 000 | 40 | 1 040 | 100 | 4 | 104 |
| Adjara | 140 | 210 | 350 | 14 | 21 | 35 |
| Guria | 30 | 100 | 130 | 3 | 10 | 13 |
| Imereti | 280 | 350 | 630 | 28 | 35 | 63 |
| Kakheti | 70 | 290 | 360 | 7 | 29 | 36 |
| Mtskheta-Mtianeti | 20 | 80 | 100 | 2 | 8 | 10 |
| Racha-Lechkhumi-Kvemo-Svaneti | 10 | 30 | 40 | 1 | 3 | 4 |
| Samegrelo-Zemo Svaneti | 160 | 270 | 430 | 16 | 27 | 43 |
| Samtskhe-Javakheti | 50 | 140 | 190 | 5 | 14 | 19 |
| Kvemo Kartli | 160 | 290 | 450 | 16 | 29 | 45 |
| Shida Kartli | 90 | 190 | 280 | 9 | 19 | 28 |
| Total | 2 010 | 1 990 | 4 000 | 201 | 199 | 400 |

PSU – primary sampling unit.

2.3 DATA ANALYSIS AND INDICATORS

Although the samples included 1 401 returned migrants and 2 599 potential migrants, an additional 284 respondents from the returned migrant database were added into potential migrant database. These cases referred to respondents counted in both the potential and returned migrant samples, i.e. randomly selected respondents aged 18-50 years, who were returnees with intention to re-migrate again. Therefore, the potential migrant database had 2 883 as the final number of cases.

Survey data were analysed using SPSS and the ETF developed common data analysis guidelines for the survey datasets. As the potential migrant survey was representative of the adult population aged 18-50 years, the corresponding analysis was based on the weighted results for the whole report (unless otherwise indicated). The returnee migration survey, however, was not weighted so as not to introduce further bias in this non-probabilistic sample. This report presents a detailed migration picture for Georgia, based on an analysis conducted by local teams with support from the ETF. The main SPSS datasets include more than 250 variables so the presentation of data has necessarily been selective. Data analysis required many cross-tabulations as well as the construction of several key composite indicators, involving a selection and weighting of first-level variables collected in the survey. In total, five composite indicators were developed for this analysis, some referring to both questionnaires and others referring to one or the other questionnaire.

1. **Propensity to migrate** refers to variables in the potential migrant questionnaire. It draws together seven discrete variables that include the likelihood of migration within six months and within two years, the ability to finance the move, the ability to speak the language of the most likely destination, a subjective assessment that the individual possesses information about the most likely destination, the presence of at least four out of six documents necessary for migration (passport, visa, work contract, work/residence permit, acceptance letter for study or training, etc.) and a subjective assessment that the person would have no difficulty in getting the remaining documents. The following thresholds were used for the propensity to migrate indicator: (i) very unlikely (total score 0-2.5); (ii) quite unlikely (total score 3-5.5); (iii) quite likely (total score 6-8.5); and (iv) very likely (total score 9-11.5). Thus prospective migrants had to score at least 6 (out of maximum of 11.5) to be considered 'ready to leave for abroad'.
2. **Social conditions** were calculated for both the potential migrant and returned migrant questionnaires. This indicator provides information on living conditions and basic household possessions. It considers the number of

people living in a household, the number of rooms in the household and the presence of a series of indicative items, such as piped drinking water, hot water, indoor flushing toilet, modern heating system, colour TV, washing machine, computer, internet connection and car. The resulting indicator has a minimum value of 0 (the poorest social conditions) and a maximum value of 2 (the best social conditions).

3. **Economic conditions** were also calculated for both the potential migrant and returned migrant questionnaires. This indicator reflects ownership of property (houses and land) and overall household income from all sources (equalised monetary income) and from remittances. The resulting indicator has a minimum value of 0 (the poorest economic situation) and a maximum value of 4 (the best economic situation).
4. **Migration outcome** as an indicator brings together nine variables relating to the period of time spent abroad and aggregates different dimensions of the migrant's legal and work status abroad. It includes career progression abroad, the fit between skill levels and the type of work, work/ residence permit, fair treatment at work and any negative experiences (such as discrimination), the recognition of education qualifications, skill development opportunities, periods of unemployment, remittances sent home and legal status while abroad. Based on the scores, migration outcome is classified in one of five categories: (i) highly successful (score 9 to 15); (ii) successful (score 4 to 8); (iii) neither successful nor unsuccessful (score 1 to 3); (iv) unsuccessful (score -2 to 0); and (v) extremely unsuccessful (below -2).
5. **Return outcome** as an indicator focuses only on the migrant's experiences since return and assesses the impact of labour migration on different dimensions of post-return work and economic status. It brings together six variables from the return migrant questionnaire including savings brought back home, work on return, post-return career opportunities, social benefits linked to migration, usefulness of migration to find a job at home and returnee's subjective assessment of the benefits of migration. Based on the scores, the return outcome is classified in one of five categories: (i) highly successful (score 9 to 12); (ii) successful (score 4 to 8); (iii) neither successful nor unsuccessful (score 1 to 3); (iv) unsuccessful (score -1 to 0); and (v) extremely unsuccessful (below -1).

2.4 FIELDWORK AND DIFFICULTIES

While the process of reaching potential migrants went smoothly, the interviewing of returned migrants was more problematic for several reasons.

- There was a relatively high non-response rate (**TABLE 2.3**), with 5 450 non-responding households (contacted on several occasions) and 1 096 of these refusing to respond. This shows the difficulty of conducting such large-scale surveys; 9 450 households had to be contacted in order to achieve the targeted sample of 4 000 respondents.
- Refusals were more typical in rural areas than in urban areas, possibly because rural populations are generally less informed about sociological surveys, more suspicious about the topic and less eager to give information about sensitive issues like (possibly illegal) migration.
- Returned migrants were generally more difficult to locate and especially in rural areas. When it was difficult to complete a cluster with the required number of returnees, the interviewers used the snowball method to locate respondents in nearby clusters (always respecting, however, the same urban/rural geographical parameters).
- In surveying the Adjara region, interviewers were frequently told that eligible household members were in Turkey for the fruit-picking season and would be back by the new year (when fieldwork would have ended).
- Less precise figures were generally given by the respondents for the income questions. Young people tended to exaggerate or declare higher incomes while older people did not reply or declared lower incomes.
- In the Kvemo Kartli region, home to many national minorities, the high non-response rate was probably due to cultural differences (e.g. women are not allowed to speak without the permission of/only in the presence of the male head of the household, people do not know data such as their birth dates, the residence of their children and so on).
- The interviewers found it difficult to make contact with potential migrants with ISCED 0-2 education level in Tbilisi, especially in the central districts.

TABLE 2.3 NON-RESPONSES BY REASON

| Reason | Number of cases | % |
|------------------------|-----------------|------------|
| Nobody at home | 2 256 | 41.4 |
| Refusal to respond | 1 096 | 20.1 |
| Respondent not at home | 1 060 | 19.4 |
| Other | 1 038 | 19.0 |
| Total | 5 450 | 100 |

3. RESULTS OF THE SURVEY OF POTENTIAL MIGRANTS

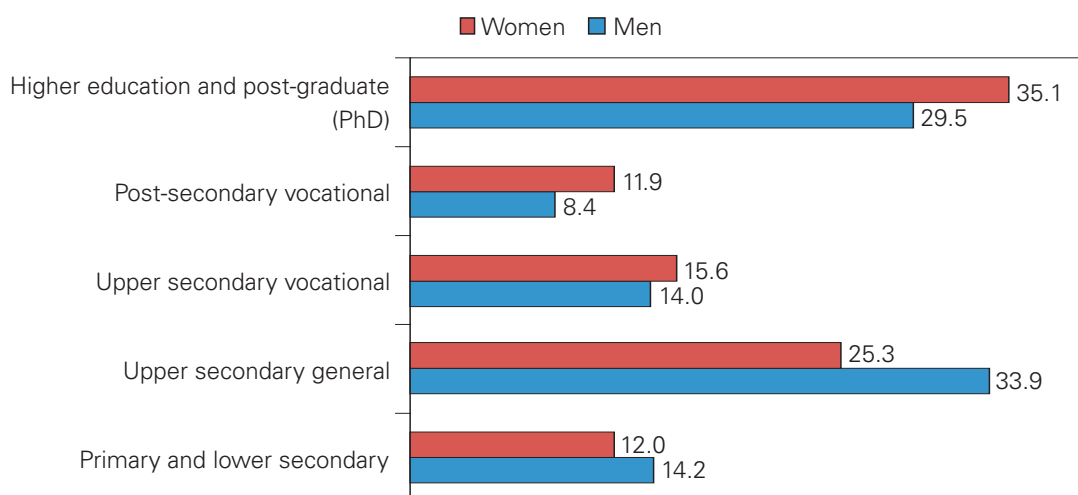
3.1 SOCIO-DEMOGRAPHIC CHARACTERISTICS²⁰

The results of the ETF survey of potential migrants can be compared with the results of existing studies summarised in Section 1.1. The sample was composed of 2,883 potential migrants (48% men and 52% women), whose average age of 35 corresponded closely to the average age of the national population (36 years, according to the 2002 census). Two thirds of these respondents lived with a partner (married or otherwise) and two thirds had children.

The main language spoken by respondents at home (as children) was Georgian (83.8% of respondents), a figure fully consistent with the ethnic composition of the national population (84% Georgian by ethnicity). Azeris and Armenians are the main ethnic minorities living in Georgia and 9.5% of our respondents spoke one of these languages as a child. Only 3.3% of the interviewed persons stated that they spoke Russian at home as children.

The relatively high education level of the Georgian population (52% and 35% have intermediate- and high-level education, respectively) is accurately reflected in the respondents in our sample: 13.1% and 32.4% had a low and a high education level, respectively (see **FIGURE 3.1** and also Annex 1 for ISCED equivalences). The women in our sample had a slightly higher education status than the men: most women had post-secondary vocational or university education, whereas almost half of the men had no vocational or higher education.

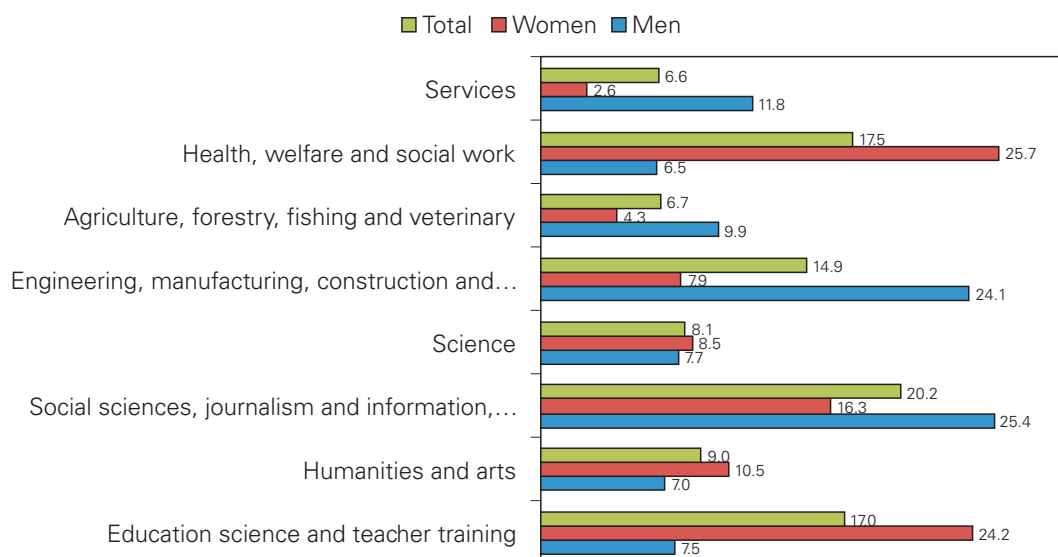
FIGURE 3.1 EDUCATION LEVEL OF POTENTIAL MIGRANTS (%)



The main education fields (as defined by ISCED) for respondents with vocational and higher education were engineering, construction and architecture for men; and education, health and social work for women, with both sexes well represented in the social sciences, business and law (**FIGURE 3.2**). The importance of education was recognised by nearly all respondents and 60% considered that education facilitated the finding of better work abroad.

Only 27% of respondents mentioned that they had worked in the previous week (reflecting the tough labour market conditions referred to in Section 1.2). According to our findings, the current or most recent employment status of respondents is closely related to their education level: 15.6% and 41.6% of respondents with a low and with a high education level respectively, had worked in the previous week. Our survey therefore shows that persons with a

²⁰ All the numbers in tables, figures and text are calculated based on the weighted – by gender and settlement – dataset of the potential migrants sample with a total of 2 883 cases, unless labelled as non-weighted data. The household weight is used for Section 3.4. The results (Chapters 3 and 4) refer to valid percentages only, excluding missing responses ('no answer'/'refuse to answer'). The percentage of missing responses is reported under each table or figure and is calculated as based on the un-weighted sample.

FIGURE 3.2 ISCED-DEFINED EDUCATION FIELDS OF POTENTIAL MIGRANTS (%)

Note: The table refers only to those with upper secondary vocation education and more (N=1 684).

university education are more likely to be currently employed. The main reason for not working was unemployment and the vast majority of respondents were looking for a paid job (more males than females).

Waged workers (current or most recent employment) accounted for most of the respondents (86.7%), while employers and self-employed persons accounted for 3.2% and 7.1%, respectively; men (14.1%) were more likely than women (6.0%) to be employers or self-employed.

The most popular employment sectors (current or most recent employment) were education (12.0%), construction (11.5%), personal services (9.4%), public administration (9.0%), commerce (7.8%), petty trade (7.4%), medicine (6.9%) and transport (5.6%). A significant proportion of women worked in education, medicine, petty trade and public administration, while the most frequent activities for men were construction, followed by transport, commerce, public administration and personal services.

With regard to respondents' skill levels (referring to current or most recent employment), nearly half (48.9%) worked as skilled workers, 28.9% as unskilled workers and 20.2% as professionals (see Annex 4)²¹. Survey data reveal the prevalence of skilled workers among men (54.2%) and women (43.0%), whereas more women (29.5%) worked as professionals than males (12.0%). Worth mentioning is the fact that unskilled work was performed not only by 39.3% of persons with an intermediate education level but also by 9.6% of respondents with higher education.

A quarter of respondents mentioned that they worked at below their education level, while almost 40% perceived their skills and abilities to be higher than needed for their job. The average working week was 48 hours. Men tended to earn more than women (EUR 235 versus EUR 143 a month on average). The education level of workers seemed to have a relatively small effect on income from employment; highly educated respondents earned just a little more than the least educated respondents (EUR 208 versus EUR 175 a month on average).

3.2 INTENTIONS TO MIGRATE

In answering 'yes' to the question 'Are you seriously thinking of moving abroad to live and work at the moment?', almost one third (31.1%) of people aged 18-50 years (36.5% of men and 26.1% of women) living in Georgia expressed their intention to go abroad (called hereafter 'prospective migrants'). The remaining 68.9% respondents answered 'no' to this question (called 'non-migrants'). Most of the prospective migrants (56.4%) mentioned that they were likely to leave Georgia within the next six months and nearly all of them planned to go abroad within two years.

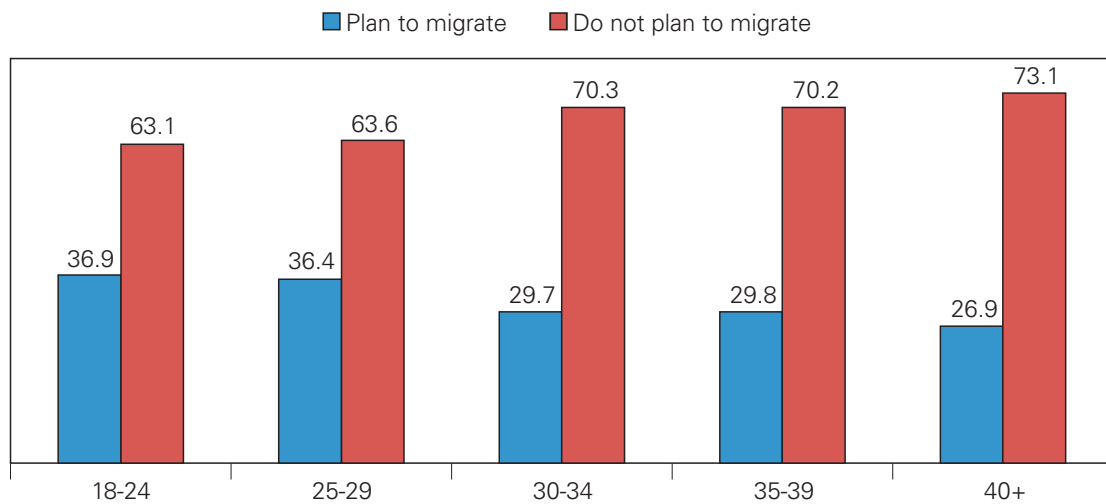
A more detailed analysis of intentions to go abroad was conducted based on the propensity to migrate indicator (see Section 2.3). Nearly one third of prospective migrants obtained the necessary readiness score, indicating, when

²¹ Due to discrepancies observed between the national occupational classification and ISCO, the former is used in this report. See Annex 4 for equivalences.

generalised to the whole target population, that 11.4% of the Georgian population aged 18-50 years was ready to migrate. The discrepancy with the expressed intention of migrating of 31.1% of the respondents reveals the difference between intention and real possibilities of migrating.

An analysis of the intention to migrate and of certain demographic and socio-economic characteristics of prospective migrants enabled us to define the main differences in the Georgian population according to the likelihood of migrating. The intention to go abroad (**FIGURE 3.3**) was highest among young people aged 18-29 years (around 37%), but was also significant (at around 27%) in the group of people aged over 40 years.

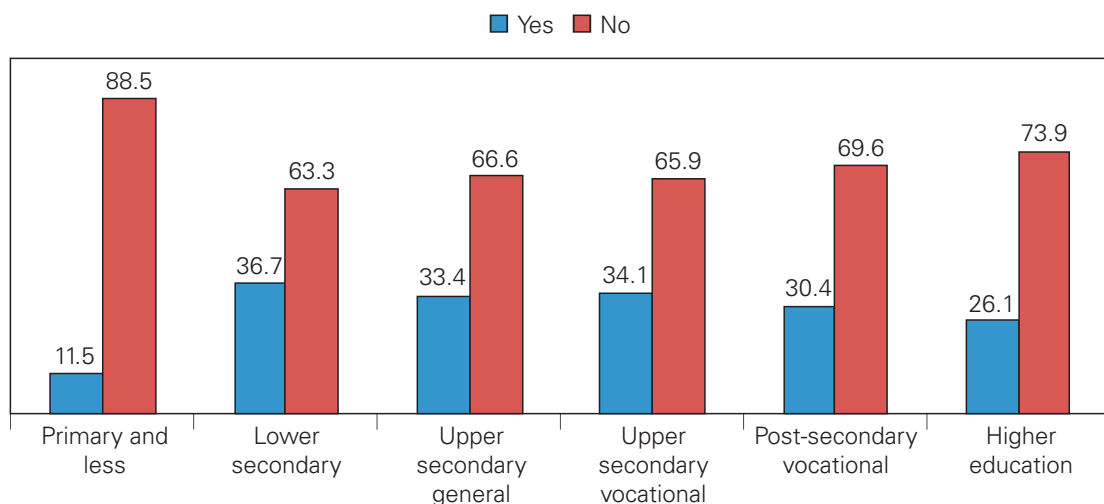
FIGURE 3.3 INTENTION TO MIGRATE BY AGE OF POTENTIAL MIGRANTS (%)



Note: The table refers only to prospective migrants (N=852).

Respondents with lower and upper secondary education (both general and vocational) showed the greatest propensity to migrate (over a third in each group), whereas only a quarter of university graduates expressed an intention to migrate (**FIGURE 3.4**).

FIGURE 3.4 INTENTION TO MIGRATE BY EDUCATION LEVEL OF POTENTIAL MIGRANTS (%)

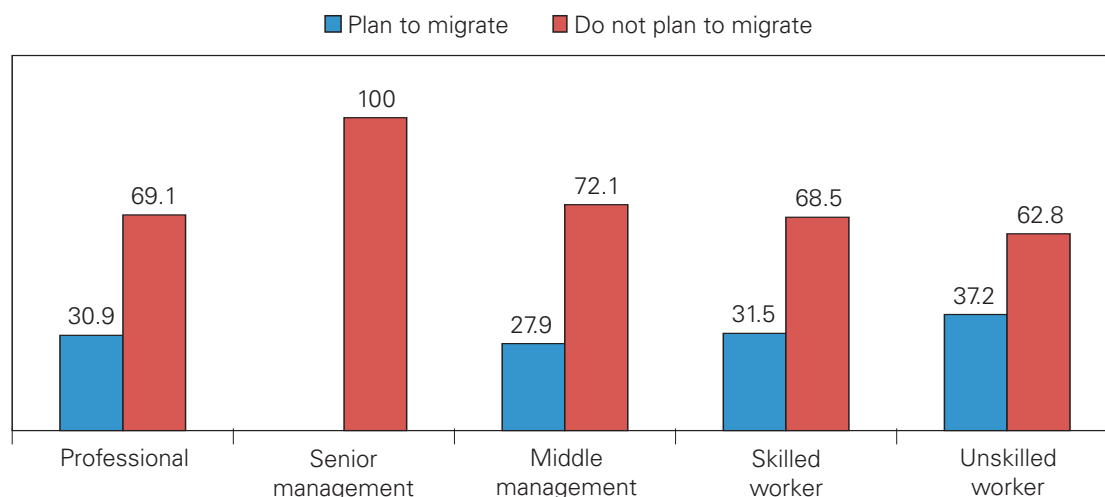


Note: The table refers only to prospective migrants (N=852). There are fewer than 50 cases in the 'primary and less' category.

People living in urban areas (other than the capital) were more likely to migrate, whereas people living in Tbilisi were the least likely to migrate. Although possibilities for analysing the data collected at the regional level were limited due to the sample design, the Kvemo Kartli region, populated largely by Azeris (the ethnic group that most frequently practises short-term seasonal labour migration), had the highest proportion of prospective migrants, with 99% of interviewed persons seriously thinking of going abroad.

Unemployed respondents (31.9%) were more likely to migrate than those without a job (28.7% of those who worked in the week prior to interview). Intention to migrate was highest among unskilled workers (**FIGURE 3.5**), followed by skilled workers. Job loss in the event of migration did not seem to be an important factor in preventing people from migration; just 2.2% of non-migrants mentioned having a job in Georgia as a main reason for not wanting to move abroad. Moreover, almost 60% of non-migrants believed that migration leads to better work opportunities upon return. The main reasons for not wanting to migrate (over 50% of non-migrants) were family and relatives and wanting to live in Georgia.

FIGURE 3.5 INTENTION TO MIGRATE BY WORK LEVEL OF POTENTIAL MIGRANTS (%)



Note: The table refers only to prospective migrants (N=852). The 'senior management' and 'middle management' categories (current or most recent employment) have fewer than 50 cases each.

The availability of financial resources was a significant factor in migration in the near future: 72.2% of prospective migrants with the necessary financial resources intended to leave Georgia within six months, compared to 52.1% of those who did not have the necessary financial resources. Knowledge of foreign languages and possession of sufficient information about destination countries seemed to be less important factors: the proportion of prospective migrants planning to leave Georgia within six months was more or less the same for those with and without the destination language and sufficient information.

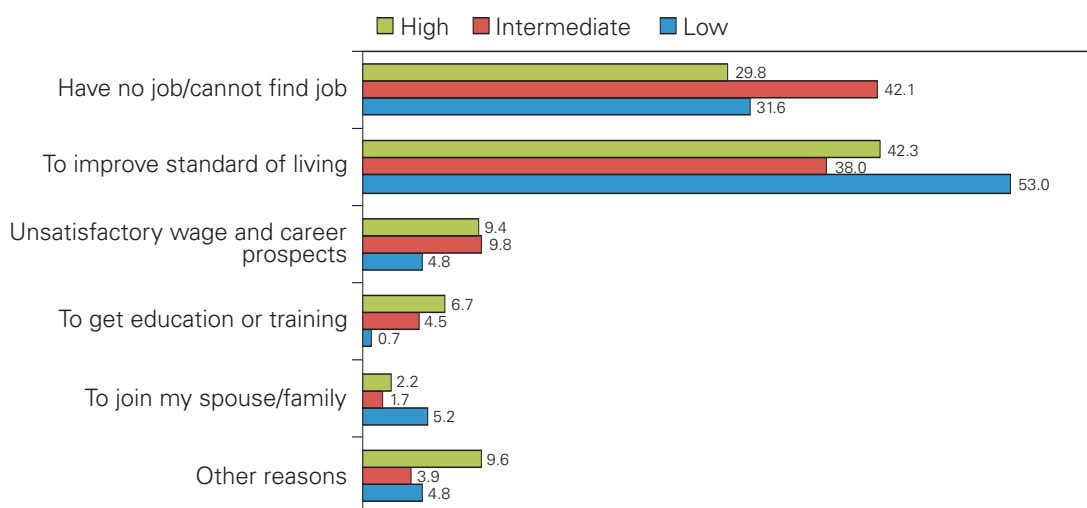
Reviewing the propensity to migrate indicator, men were as ready as women to migrate; people aged 18-24 years and those aged over 40 years had the highest mean values (5); there was a negative correlation between education level and the intention to migrate (mean value 4.9 for respondents with lower and upper secondary education versus 4.6 for highly educated people); and those currently holding a job in Georgia were slightly less likely to migrate.

Awareness among potential migrants concerning official migration schemes was low, with 95.4% of respondents not aware of any such scheme. This can be explained by very limited opportunities for legal labour migration abroad and insufficient access to information concerning the few initiatives funded by the EU or other donors. As explained in Section 1.5 (and Annex 2), there are currently no bilateral labour agreements and very few official migration schemes. All the previous migration studies confirm that, in the absence of legal migration mechanisms, informal networks of Georgian emigrants in the destination countries act as informal intermediaries for organising the first trip and job abroad. Although this assistance by compatriots living abroad obviously facilitates the migration process and makes adaptation easier for migrants, it may reduce the preparation and dependence on legal channels of the latter.

Migrants often do not properly prepare for their trip and so arrive in a foreign country without the necessary knowledge and skills. Most prospective migrants (84.3%) stated that the most important support would be help in finding a job abroad, so there is a high perceived need for formal and effective mechanisms for matching potential migrants from Georgia with employers abroad. The most important job-search strategy was to seek help from family, friends and acquaintances already abroad (51.5%). The strategy of applying to an official employment agency in Georgia or the destination country was chosen by only 15.7% of migrants.

The survey shows that the decision to migrate was mostly made by the prospective migrants themselves (64.6%). Sometimes it was made with the participation of other persons, more often in the case of women (46.0%). The main reasons for leaving Georgia mentioned by prospective migrants at all educational levels were unemployment and the need to improve living standards (**FIGURE 3.6**). Having no job was the main reason for 31.6%, 42.1% and 29.8% of respondents with low, intermediate and high education levels, respectively, and was the main motivation for 42.4% of men and 30.7% of women. Unsatisfactory pay and career perspectives were also mentioned as another important reason by around 10% of both sexes.

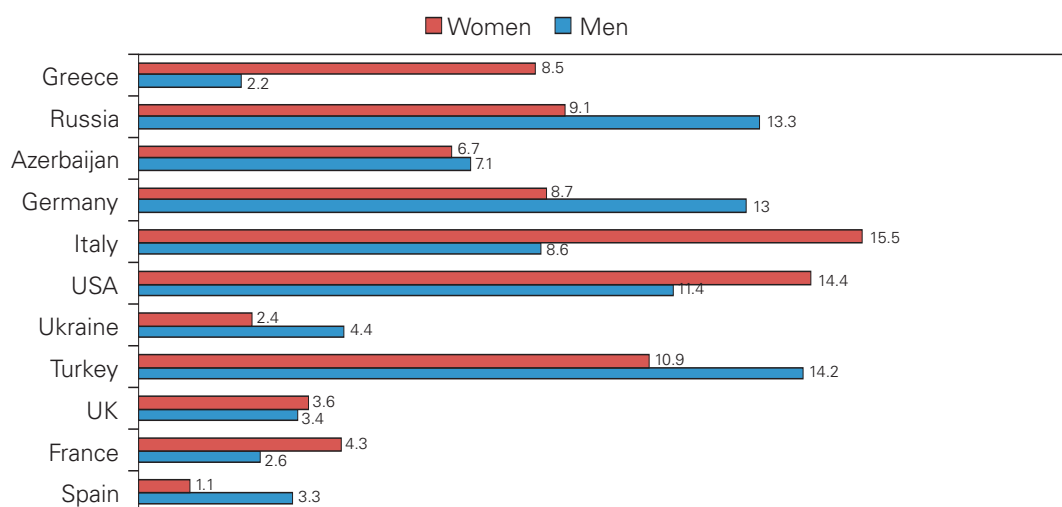
FIGURE 3.6 REASONS FOR MIGRATION BY EDUCATION LEVEL OF PROSPECTIVE MIGRANTS (%)



Note: The table refers only to prospective migrants (N=852). Missing values below 5%.

Hence, the main motivation for migration was the search for a better future, given the lack of employment opportunities and the unfavourable working and living conditions in Georgia. That is why up to 78.2% of prospective migrants mentioned that they would not go abroad without a job there. However, a closer look at the link between education and migration reveals that education or training was cited by 6.7% of highly educated Georgians as an important reason for migration in the first place.

When prospective migrants were asked the country they would most likely migrate to, Turkey (12.8%), the USA (12.7%), Italy (11.6%) and Russia (11.5%) were the most likely destinations. A determining factor for Turkey is that, unlike Russia, Georgians do not require an entry visa. Gender-related preferences for particular destinations exist (**FIGURE 3.7**); women seemed to prefer European countries (especially Italy) and the USA, whereas men preferred Russia and Turkey. These preferences were determined by specific labour market demands: for women in domestic and service sectors and for men in industry.

FIGURE 3.7 MOST LIKELY DESTINATIONS INDICATED BY PROSPECTIVE MIGRANTS (%)

Note: The table refers only to prospective migrants (N=852). Missing values account for 7%.

The survey data also reveal that the education level of the respondents influenced the choice of destinations. Turkey was the most likely destination for a high share of prospective migrants with low (17.7%) and intermediate (15.1%) education levels, compared to 5.5% for migrants with a high education level. Russia was the second most likely destination, with 13.5%, 12.6% and 8.2%, respectively, as the corresponding figures for education level. For 22.1% of highly educated migrants, the USA was the preferred destination, followed by Italy and Germany (13.6% and 12.6%, respectively). The major reason given for choosing a specific destination was that it offered more jobs and/or income opportunities.

3.3 EXPECTATIONS

Nearly all the prospective migrants believed that migration would improve their financial situation, with 97.4% of them expecting that, on return, they would be better off or much better off than non-migrants. Moreover, 85.8% of prospective migrants thought that migration would enhance their qualifications and skills. Almost three quarters of prospective migrants intended to stay abroad for a period of one to five years; only 3.2% intended to leave Georgia permanently.

More than half of the prospective migrants planned to go abroad with a spouse – women more so than men (71.1% versus 39.6%). As the main reason for not accompanying their spouse, more than 80% of respondents stated the need to care for a family farm or business in Georgia. Most prospective migrants (91%) intended to send remittances back to their family whilst abroad, to be used mainly to meet living expenses for family and relatives. Prospective migrants would expect some part of the remittances to be saved or used to purchase durables/property.

The survey shows that prospective migrants were more or less aware of the situation in their most likely destination, with 60% declaring that they had sufficient information. Almost half (45.9%) obtained this information from relatives or friends in the destination country, 14.3% from people in Georgia and 18.1% from the internet; 14.7% of prospective migrants had been in the country before. Prospective migrants also seemed to be well informed about specific labour demands in foreign countries: 48.2% of interviewed women and 32.8% of men expected to work abroad as unskilled workers. Only 12.4% of the highly educated respondents expected to work as professionals abroad. These results corroborate the reported experiences of returnees (described in Chapter 4).

There was little information and awareness among prospective migrants regarding pre-departure training. However, 40.0% of prospective migrants (more females than males) expressed an interest in receiving such training before migration. In addition, 41.6% of prospective migrants considered it important to validate their skills abroad; 29.1% of these acknowledged the importance of the recognition of qualifications and mentioned that they would apply for the procedure. However, 12.5% did not think that they would have access to this procedure and almost 55% of the respondents were unaware of such a procedure.

3.4 HOUSEHOLD ECONOMIC AND LIVING CONDITIONS

The ETF social conditions and economic conditions indicators (Section 2.3) were used to assess the current conditions of potential migrants.

Most of the households (91.1 %) had no family member abroad at the time of interview; hence, few households had previous migration experience. It seems that, in Georgia, leaving aside households that have already experienced temporary migration (10%, according to official statistics), a great many households can expect to be affected by labour migration in the future. The main reason is the current socio-economic situation in Georgia, where poverty (especially in rural areas) and the lack of paid employment are still major challenges. As explained in Section 1.2, many people work on small plots of land to earn a subsistence living. Indeed, most of our respondents, both men and women, confirmed that their household income was not sufficient to cover basic needs. This seems to be a common situation in Georgia, as up to 70.8% of respondents noted that their household was the same or better off compared to other households.

The house ownership rate is high in Georgia. The majority of potential migrants (89.7%) lived in their own apartments or houses (four rooms on average). Access to agricultural land for rural households is also widespread since the large-scale land privatisation of the beginning of the 1990s. According to our survey, over half of the interviewed households owned agricultural land (51 % of both prospective migrants and non-migrants) – 0.5 hectares and 0.6 hectares on average per household for prospective migrants and non-migrants, respectively.

Despite the advantages of house and land ownership, the results for the economic conditions indicator were low compared to the maximum possible score of 4; furthermore, there was no difference between prospective migrant and non-migrant groups (each scored 2 on average). Only 15.8% of interviewed households with both prospective migrants and non-migrants achieved a score of 3 or higher (very good economic conditions) and 60.5% of respondents lived in households with a score of 2 or less. The average score was slightly higher for households with male respondents compared to female respondents (2.1 versus 1.9). Analysing the results according to socio-demographic characteristics, no significant correlation was found for marital status, education level and the number of children. Even employment status did not have a significant impact on scores (2.1 for the households with the respondents who had worked in the week prior to the interview versus 2.0 for those who had not worked).

As for the social conditions indicator, a score of 1.1 out of a maximum possible value 2 was obtained for both the prospective migrant and non-migrant groups, indicating almost no diversity among households with different socio-demographic characteristics, except for a slightly higher score (1.3) for the households with the most highly educated respondents as compared to those with respondents with low and intermediate education levels.

These two indicators reveal that a large share of households lives in rather unsatisfactory conditions. The fact that cash incomes of households in Georgia are low has been demonstrated by many other studies (see Section 1.2). According to our survey, the average income of interviewed households²² was no more than EUR 233 per month, of which EUR 172 were earnings from work, EUR 22 were social transfers and EUR 10 was remittances. Households receiving remittances from abroad accounted for 12.8% of the interviewed households. When exist, remittances contributed significantly to the household budget, with an average of EUR 1 050 received over the previous year.

How well an average household makes ends meet with this sum of money is an issue that merits special discussion. It is not a large amount of money, but given that the subsistence minimum for an average family is around EUR 130 per month (Georgian official statistics), this sum probably covers basic household expenses, such as food, utilities and monthly rent or mortgage payments (around EUR 50 per month per household according to our survey).

²² The household size is not taken into account.

4. RESULTS OF THE SURVEY OF RETURNED MIGRANTS

4.1 SOCIO-DEMOGRAPHIC CHARACTERISTICS

This chapter includes an analysis of the ETF survey of returned migrants, whose results can be compared with the results of existing studies (summarised in Section 1.1). In the sample of 1 401 returned migrants, males accounted for 59% of the respondents (**TABLE 4.1**). However, among those whose main destination was an EU country, both sexes were well represented, with females slightly more numerous than males (55%). This confirms the findings of other migration studies concerning the gender-related preferences of Georgian migrants for particular countries. Thus, Greece, Germany and Italy were the preferred destinations for female migrants, whereas CIS countries were preferred by male migrants, mainly Russia, Ukraine and Azerbaijan. According to our survey, male returnees constitute around 75% of the total number of returned migrants from CIS countries.

Returned migrants tended to be young regardless of the country of destination: almost 80% were aged between 20 and 50 years and over half were in their 30s and 40s. Only 16.7% of men and 23.5% of women were over 50 years old. The average age of returnees (41 years) was slightly higher than for potential migrants and returnee women were slightly older than returnee men. Given the fact that average duration of migration is three years, the most productive period of their working life had been spent abroad. Table 4.1 shows the demographic profiles for migrants who returned from an EU country and migrants who returned from other destinations.

Most returnees (60%) were married with children; almost half (45%) had dependent children aged under 18 years old. The vast majority of married returnees (82.1% males and 70.2% females) were not accompanied by their spouse during their migration; the main reasons given were the need to take care of a family farm or business (51.7% women and 46.2% men) or of children or other dependants (almost one third of respondents).

Hence, significant numbers of minor children are left behind due to the temporary migration of parents. The situation may be more traumatic for children of single parents who remain in the care of other family members and relatives. Indeed, our survey shows that single mothers were just as likely to go abroad for work as other women. Divorced and widowed respondents constituted 26% of all female returnees but only 6.8% of male returnees. More than half of the divorced mothers in our sample had children aged under 18 years old. Assuming that they had been single before migration, their minor children were possibly left in the care of family and relatives in Georgia.

Migrants from Georgia are usually well educated (see Sections 1.1 and 1.3). According to our findings, 31.1% of returnees had a university degree, while another 27.9% of returnees had an upper or post-secondary vocational education. Hence, nearly two thirds of migrants (59%) had at least a vocational or university qualification. The share of returnees with a university education was 46.2% in the case of returnees from an EU destination. Together with upper and post-secondary vocational education graduates, these made up three quarters of EU returnees and slightly more than half (53.9%) of CIS country returnees. Female migrants were particularly highly educated: the proportion of women with a university degree was 36.8% and another 32.8% had some kind of vocational degree.

Going abroad for work requires a person to be well informed about the foreign labour market situation, to possess foreign language skills and to be flexible in terms of territorial mobility. The well-educated stratum of society typically meets all these requirements and they have the ability to establish contacts in foreign countries and to adapt to new environments. According to our survey, more than two thirds of the returned migrants had a good knowledge of the Russian language and 20.4% had at least a basic knowledge of English. Possibly due to a high degree of underemployment, the potential of these people is not properly used at home and this pushes them to go abroad for work.

The interviewed returnees believed that education was very important. Nearly all of them agreed that education helped people improve living standards; moreover, 57% agreed that obtaining a higher level of education at home facilitates finding a better job abroad. However, as the following analysis shows, the reality was sometimes quite different.

TABLE 4.1 PROFILES OF RETURNED MIGRANTS FROM EU AND OTHER MAIN DESTINATIONS (%)

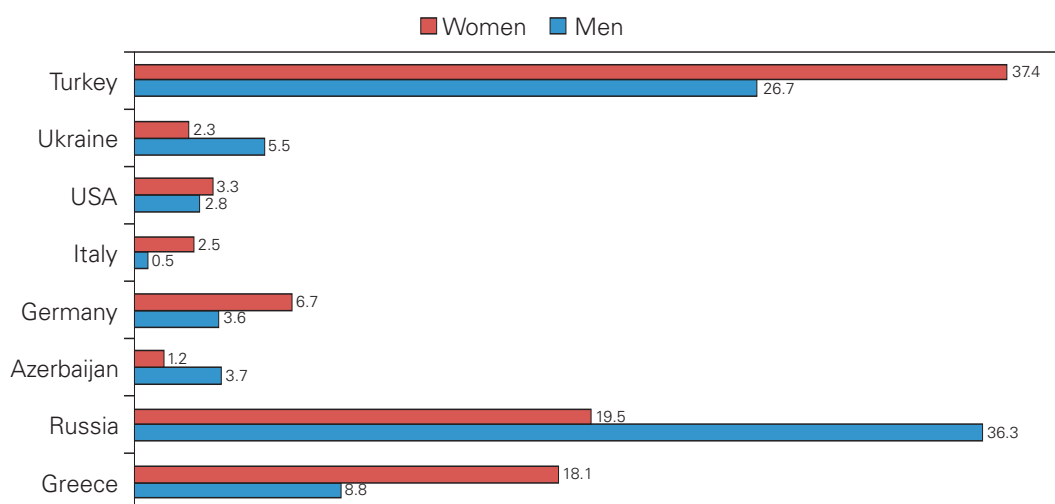
| Returnees | Total | EU countries | Non-EU destinations |
|----------------------------|-------|--------------|---------------------|
| Gender | | | |
| Male | 59.3 | 44.7 | 64.0 |
| Female | 40.7 | 55.3 | 36.0 |
| Age (years) | | | |
| Under 20 | 0.8 | 1.2 | 0.7 |
| 20-24 | 6.3 | 6.5 | 6.2 |
| 25-29 | 12.1 | 16.3 | 10.7 |
| 30-34 | 13.9 | 17.5 | 12.8 |
| 35-39 | 13.6 | 16.3 | 12.8 |
| 40-44 | 16.2 | 10.7 | 18.0 |
| 45-49 | 14.7 | 10.7 | 16.0 |
| 50-54 | 10.8 | 9.8 | 11.1 |
| 55-59 | 5.8 | 5.0 | 6.0 |
| 60-64 | 3.6 | 4.1 | 3.5 |
| 65-69 | 1.4 | 1.2 | 1.4 |
| 70 and more | 0.9 | 0.9 | 0.8 |
| Marital status | | | |
| Never married | 20.7 | 26.9 | 18.7 |
| Married/living together | 64.7 | 58.3 | 66.7 |
| Divorced/separated | 9.4 | 10.7 | 8.9 |
| Widowed | 5.3 | 4.1 | 5.6 |
| Children | | | |
| Yes | 73.4 | 66.9 | 75.4 |
| No | 26.6 | 33.1 | 24.6 |
| Education | | | |
| Primary and less | 0.3 | 0.0 | 0.4 |
| Lower secondary | 1.6 | 0.9 | 1.9 |
| Upper secondary general | 39.2 | 24.6 | 43.8 |
| Upper secondary vocational | 18.0 | 19.5 | 17.5 |
| Post-secondary vocational | 9.9 | 8.9 | 10.2 |
| Bachelor/master degree | 30.0 | 45.6 | 25.0 |
| PhD | 1.1 | 0.6 | 1.2 |

4.2 MIGRATION HISTORY

Georgian migrants usually stayed abroad for slightly less than three years on average per migration period. Over half (55.2%) spent more than one year abroad per migration period, while one third returned to Georgia in the first six months after migration. Women migrants tended to stay a few months less than men; returnees from EU countries stayed abroad longer than returnees from other destinations like Turkey and Russia. In the case of Turkey, this can be explained by circulatory movements largely facilitated by visa-free entry. There is no clear explanation for the case of Russia, however, as entry visas are required for Georgians.

Most respondents (77.2%) had migrated only once, 13.7% twice and 9.1% three times or more. Hence, almost a quarter of migrants in our sample showed a pattern of circular migration. Further analysis of these circular migrants (a small but significant share of respondents) revealed that 38.1% went to Turkey and 27.5% to Russia. Indeed, most of these respondents migrated several times (at least twice) to the same country.

FIGURE 4.1 FIRST DESTINATION COUNTRY FOR RETURNEES (%)



The first destination countries for Georgian returnees were Turkey and Russia (31% and 29.5% of respondents, respectively), followed by Greece (12.6%) and Germany (4.9%). **FIGURE 4.1** shows that while Turkey was the preferred destination for Georgian women, Russia was the first destination for Georgian men, although a significant share had also returned from Turkey. Although EU countries are a popular destination (24%), most Georgian migrants went to non-EU destinations (76%). More women prefer to go to EU destinations (32% versus 19% of men), while more men go to non-EU destinations (81% versus 68% of women).

The first-choice destination seemed to be correlated with the education level of respondents: although Turkey and Russia were the preferred destinations for migrants of all education levels (referring to education level prior to migration), a significant share of returnees with university qualifications chose Greece (13%), Germany (9.3%) and the USA (7.3%) as their first destination. Among those with upper or post-secondary vocational education, 16.2% chose Greece as their first destination.

Almost without exception, migrants went abroad to find work and to earn additional income. This was a primary motivation for the vast majority of returnees (83%), who referred to the absence of work or unsatisfactory wage and career prospects in Georgia. Having no job was given as a reason by more than half of the respondents. Only 5.4% of returnees left Georgia for education or training abroad and only 4.0% went abroad to accompany spouse or family members (more significant for women than for men).

Awareness of programmes to help people go abroad for work was extremely low: 92.2% of respondents were not aware of any such programme when they left and those who were aware of them knew only about private companies/individuals profiting from such services. Overall 5.9% of returnees received some kind of pre-departure training before leaving Georgia (mostly language courses). The share of persons who attended specific training prior to migration was highest (11.5%) among respondents with higher education.

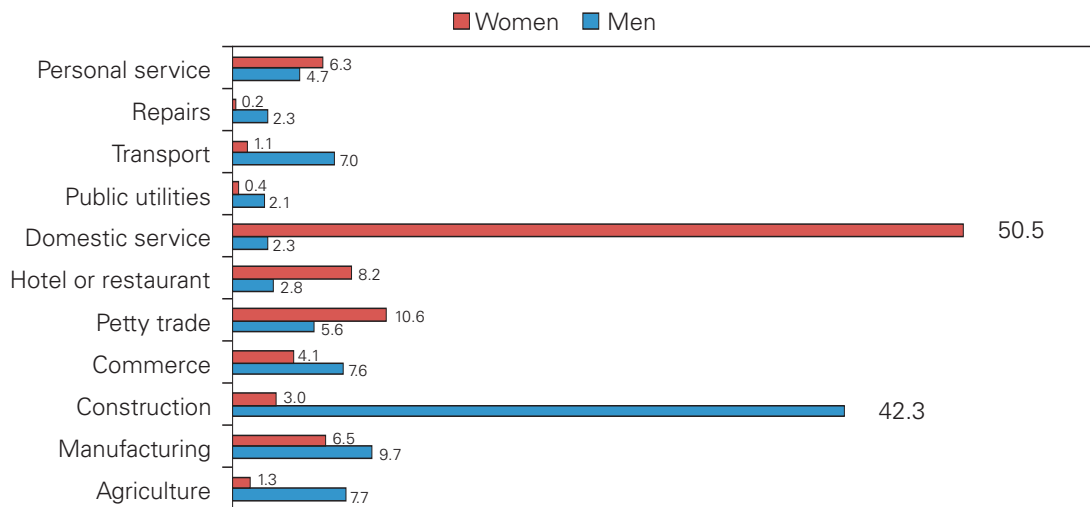
Georgian migrants usually relied on their own personal contacts and networks abroad: 70.5% of our respondents found work with the help of family, friends and acquaintances who had settled abroad earlier, 21.3% found work using their links at home and 15.8% found work through an intermediary firm in Georgia or abroad. Thus, informal networks of Georgians function in the place of legal labour migration channels; these networks are particularly relevant for EU destinations and often even determine the choice of destination. Having friends or relatives in the destination was cited by our respondents as a primary motivation for migration to most EU destinations, except for Germany (chosen for educational opportunities).

4.3 WORK EXPERIENCE ABROAD

The survey revealed that Georgian migrants experienced difficulties in finding work abroad. One third of interviewees mentioned that they had experienced unemployment (average 5.5 months) during their migration period; very few unemployed migrants received support from local authorities, social assistance benefits or job-search guidance and counselling. That is why nearly three quarters of returnees considered that support for finding work abroad was the most important help needed by migrants.

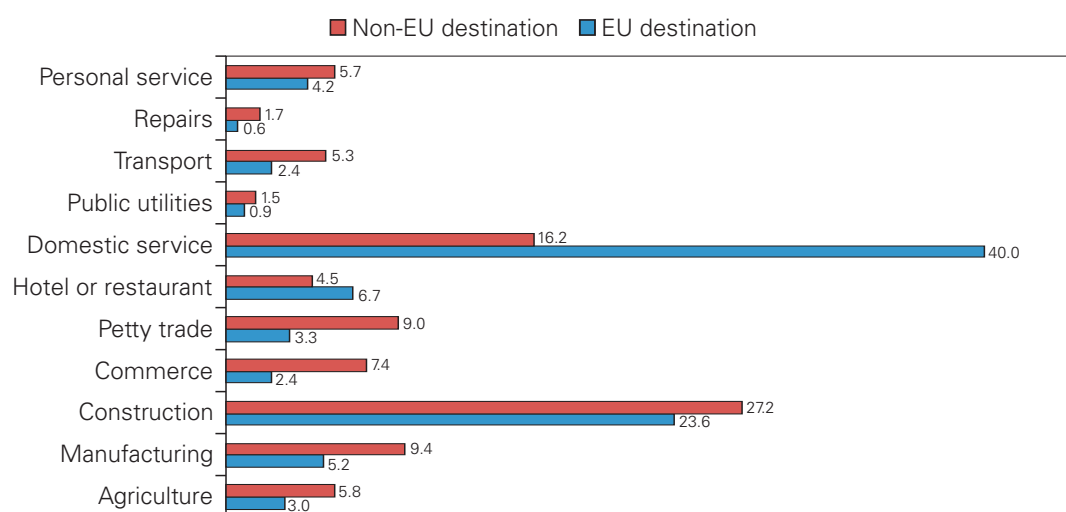
FIGURE 4.2 shows that Georgian migrants mainly worked in the services sector (particularly domestic service), construction and trade activities abroad. Referring to the job performed for the longest time in the case of having changed jobs, 26.4% worked in construction, 21.9% in domestic service, 8.4% in manufacturing, 7.6% in petty trade, 5.3% in personal services and 5.1% in agriculture.

FIGURE 4.2 MAIN EMPLOYMENT SECTORS ABROAD BY GENDER (%)



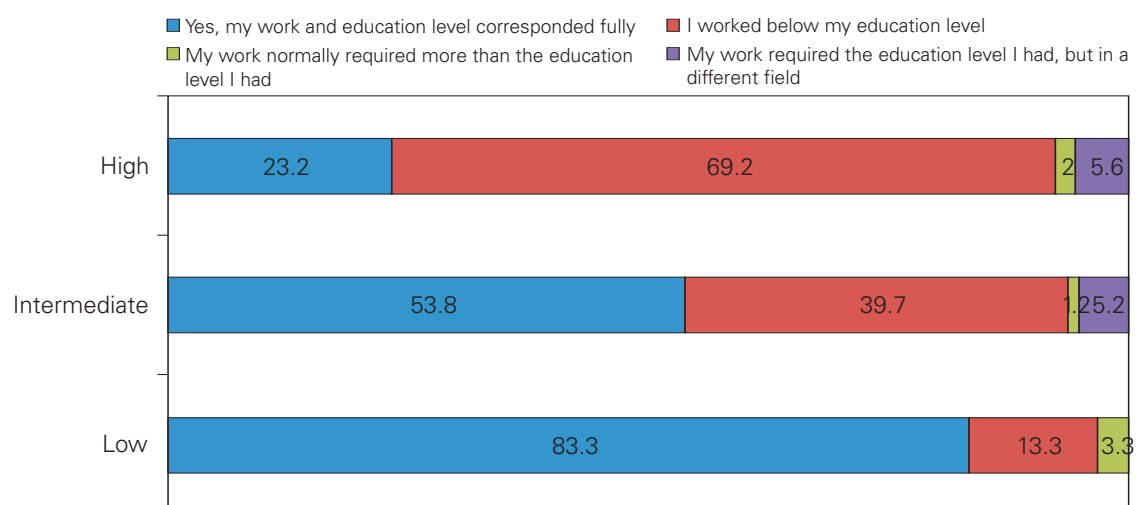
Note: Missing values account for 2%.

Men and women had different employment patterns; around half of migrant women worked abroad in domestic services, particularly in Greece and Turkey. Construction, trade and manufacturing were the more typical activities for male returnees from Russia and other CIS countries, compared to domestic service for EU destinations (see **FIGURE 4.3**). More than three quarters of migrants worked as waged workers; only 4.2% and 11.9% were employers and self-employed, respectively. Concerning the level of the work performed abroad by returnees, 44.2% were employed as skilled workers, 51.2% as unskilled workers and 4.1% as professionals. Only 0.5% of the returnees mentioned that they worked as middle managers.

FIGURE 4.3 MAIN EMPLOYMENT SECTORS IN EU VERSUS NON-EU COUNTRIES (%)

Note: Missing values account for 2%. The destination is understood as the main destination country.

Looking specifically at migrants with university qualifications (referring to education prior to migration), only 9.4% worked as professionals abroad, while about 50% and 40% worked as unskilled and skilled workers, respectively. This was particularly the case for women, despite having a higher education level than males; more than 70% of interviewed women worked as unskilled workers abroad. Thus, better educated migrants were likely to perform jobs abroad that did not correspond to their education status. Indeed, based on the perceptions of returnees, almost half (47.8%) declared that the work they performed abroad was below their education level; furthermore, this percentage increased in line with education level (**FIGURE 4.4**). Another 45.5% declared that the work performed abroad corresponded to their education level. A positive relationship was found, in particular, between skill level and education for migrants with an intermediate education level: the proportion of those who worked abroad as unskilled workers was higher among returnees without any professional education and was lowest among migrants with post-secondary vocational education.

FIGURE 4.4 CORRESPONDENCE BETWEEN WORK ABROAD AND EDUCATION LEVEL PRIOR MIGRATION (%)

A comparison of the work experiences of Georgian returnees from EU countries and from other destinations accounts for this diversity: while only 28.1% of returnees from EU countries mentioned that the work performed abroad fully corresponded to their education status, more than half the returnees from other destinations stated as much. Georgians

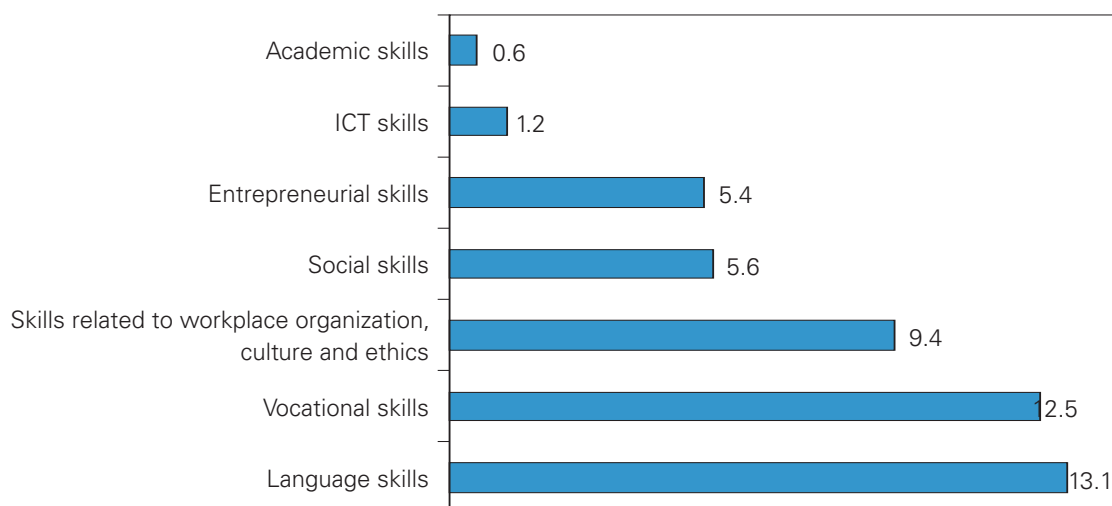
leaving for non-European destinations probably have more opportunities to find better kinds of work, particularly in the post-Soviet countries, and also by the fact that people leaving for these destinations are usually less educated (hence, the work they perform corresponds more closely to their low education level). Better educated migrants to Europe, meanwhile, are more likely to accept jobs below their education level.

To check for another explanation for the diversity in results, the recognition of qualifications was analysed to determine if there was a meaningful relationship between the education level of migrants and their working experience abroad. Almost 30% of the interviewed returnees (more men than women) mentioned that their educational qualifications were officially recognised in the destination country. Although this quite high level of recognition would seem to partially facilitate better correspondence between education and work performed abroad, a more detailed analysis of migrant education level and their work abroad shows that most Georgian migrants had access only to low-level skilled and unskilled jobs. This type of work was performed by over 95.4% of our respondents, irrespective of gender and education level.

Possible reasons for the above-mentioned outcomes are the irregular status of many Georgian labour migrants in EU countries and the limited job opportunities available to migrants. Georgians have very few legal means to go abroad for work. According to our survey, only 5% of the respondents had an official work permit from the relevant state authorities and only 20.5% of migrants managed to obtain an official residence permit during their stay abroad. Georgian migrants rarely had an official written contract with employers abroad: only 13.7% of our survey respondents had such a contract. Correspondingly, they are not covered by any social security scheme; indeed, coverage during labour activities abroad was the exception, mentioned only by 3.3% of our respondents.

The education and training experience of migrants abroad was also analysed. The survey shows that 9.9% of interviewed returnees had studied or attended formal training while abroad, mainly language training (62% of females and 47% of males) or vocational training (equally taken up by around 36% of both sexes); this figure was significantly higher (20.3%) for respondents with higher education. In addition, 15.4% of women and 8.3% of men attended graduate/post-graduate courses abroad. As a result, one third of the respondents confirmed that they had acquired new skills and experiences while abroad: 13.1% of respondents mentioned language skills; 12.5% referred to vocational/technical skills; 9.4% mentioned skills related to workplace organisation, culture and work ethics; and 5.4% referred to entrepreneurship skills (**FIGURE 4.5**).

FIGURE 4.5 NEW SKILLS AND EXPERIENCES GAINED ABROAD (%)



ICT – information and communication technologies.

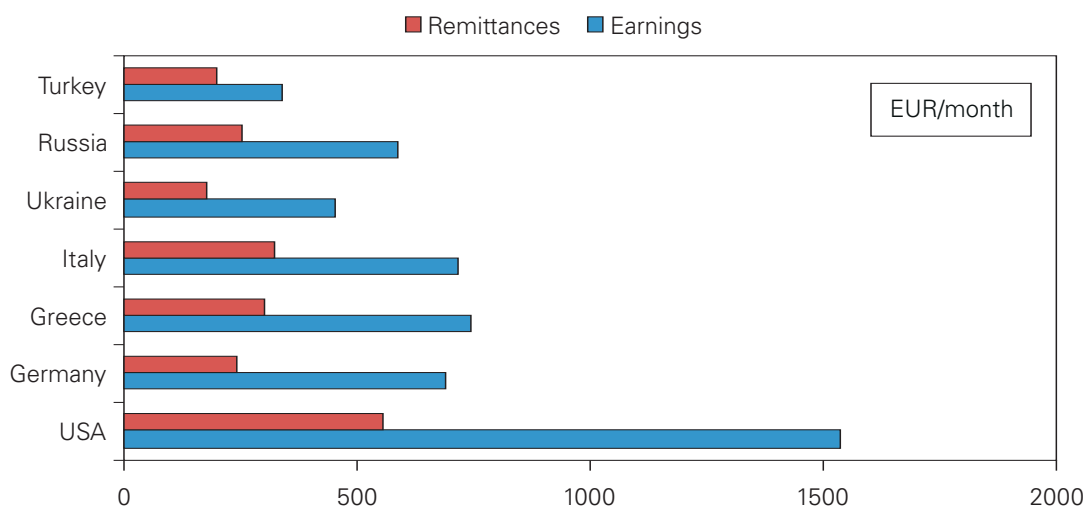
The survey reveals that very few Georgian migrants had, in general, negative experiences; 92.7% of returnees mentioned not experiencing discrimination abroad. Only 4.0% of the interviewed respondents had experienced unfair treatment in the workplace related to working hours and pay and 2.8% mentioned general unfriendliness and rejection by the local population.

Returnees tended to work long hours, on average 58 hours per week; particularly alarming was the situation in Turkey where migrants worked on average 65 hours per week. Female migrants were likely to work longer hours than males, while migrants in EU countries worked an average of seven hours less per week than in other destinations.

In line with the economic motivation for migration, 63.7% of interviewed returnees declared sending remittances to Georgia. Migrants sent EUR 261 on average per month; women were likely to send slightly more money than men despite the fact that they generally earned less. At the same time, the proportion of males (67.0%) who sent money back was higher than females (58.9%). The survey shows that the kind of work did not much affect the probability of sending remittances: both waged and self-employed workers were likely to send remittances, although only third of casual workers abroad sent remittances. The skill level of migrants was also less significant in relation to remittances, as most migrants abroad worked in low-level jobs; skilled workers were slightly more likely to send money home than unskilled workers, however.

The average amount of remittances varied according to the destination countries. Remittances from EU countries were higher than from other destinations (EUR 309 versus EUR 242). Among the main destinations of Georgian migrants, Turkey and the USA were characterised by the smallest remittances (EUR 203) and highest remittances (EUR 556) per month, respectively (**FIGURE 4.6**).

FIGURE 4.6 EARNINGS AND REMITTANCES FROM SELECTED DESTINATION COUNTRIES



Note: Missing values below 10% except for USA (16%); Turkey (16% in case of remittances); Russia (15%); Ukraine (11% in case of remittances and 18% in case of earnings); and Greece (17% in case of remittances). The data on average remittances refer only to those respondents who indicated to send remittances (N=893).

The amount of remittances evidently depends on the incomes of migrants abroad. Except for Turkey, the countries where Georgian migrants received higher wages were also the countries where migrants provided greater financial support to their families. Living costs in the destination countries also played a significant role. Turkey, despite comparatively low salaries, has relatively low living costs, so Georgian migrants managed to extend substantial help to family members. According to our survey, Georgian migrants in Turkey were sending back 59% of their monthly incomes, whereas migrants in other countries were sending back a third to a half of their monthly earnings.

The survey findings show that more educated migrants (referring to education prior to migration) sent more money back than less educated migrants, with an average difference of around EUR 60 per month. It should be mentioned that education level was also positively correlated with migrant earnings: more educated migrants earned more abroad. It seems that the ability to better adapt to a new social environment abroad, along with the capacity to find better paid work, are closely related to the basic education status of respondents.

The duration of migration seemed to be also positively correlated with earnings: those who stayed abroad longer had higher salaries. According to our survey, respondents abroad for longer than one year (per migration period) earned on average EUR 688 per month; this contrasts with the EUR 404 earned by migrants abroad for less than six months.

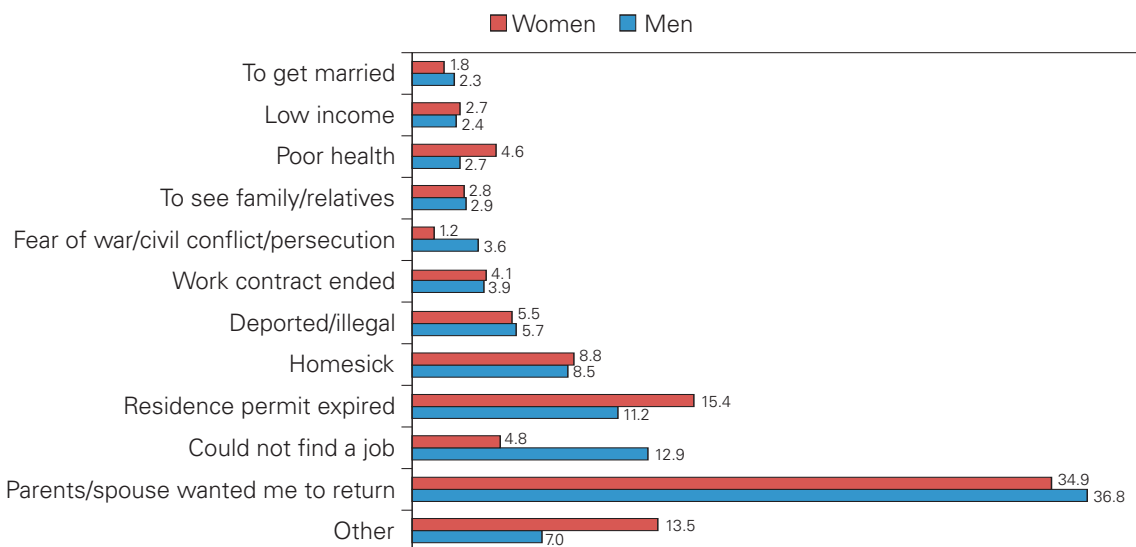
The survey shows that remittances were spent mainly on the living expenses of family and relatives in Georgia: nearly all (97%) the respondents who sent remittances home mentioned this use of the money irrespective of the economic status of the family. Others mentioned buying a property (3.8% of respondents), investment in the education of children (14.2%) and debt repayment (2.8%). Investment of remittances in education was notably high, with money sent by female migrants more likely to be spent on education and on buying durables (other than family living expenses).

4.4 EXPERIENCES ON RETURN

Our survey shows that migrants from Georgia usually returned home after one to three years. The reasons for return were diverse but can be broadly classified (irrespective of education, gender and skill level abroad) as personal, legal or health-related issues, inability to find job and secure sufficient income abroad, achieving goals set for migration and expectations of better conditions and perspectives at home.

Personal reasons were the main reason for return, given by over half of the respondents (**FIGURE 4.7**). Such reasons are linked to specific circumstances in the families of migrants, migrant's feelings and nostalgia and the wish to be close to family, friends and relatives. They include a spouse's or parent's request to come back, problems with raising children, homesickness, the wish to marry or the intention to educate children in Georgia. Around 12% of respondents cited the problem of finding work or low incomes abroad as the main reason for return and another 23% experienced legal problems abroad or were deported to the homeland. Bad health condition was mentioned by 3.5% of the respondents and around 2% returned to homeland on the expectation of (good) job offers and better living conditions. Very few interviewed persons (0.8%) returned after saving enough money or to start a business in Georgia.

FIGURE 4.7 MAIN REASONS FOR RETURN (%)



Note: Missing values account for 1%.

Georgian migrants usually did not benefit from official return schemes: only 1.8% of returnees were aware of such schemes to assist migrants on return and, in our whole sample, only one female returnee with higher education mentioned benefiting from a return scheme. Of respondents knowing about such schemes and not participating in them, 25.0% reported that they did not need to apply and managed by themselves. Other respondents mentioned three main reasons for not participating in the official return schemes: the scheme did not correspond to the kind of work they were seeking, application procedures were too complicated and there was corruption involved.

Besides sending remittances, labour migrants tried to save money for their return, with 66.6% of returnees managing to bring some savings home. Interestingly, more casual and unskilled workers managed to save and bring money back. This may be explained by the fact that these migrants were less likely to send money back to Georgia regularly due to the instability of their jobs; instead, they saved money for possible periods of unemployment abroad. The savings after return were used in Georgia in a similar way as remittances, that is, mainly for living expenses, durables, the education of children and medical expenses; 5.6% of the respondents used savings to buy property, 6.8% simply kept the money and 3.0% said that they used their savings to launch a business activity on return.

According to our survey, most returnees did not manage to find work immediately on return. Indeed, most of those who encountered problems on return mentioned the difficulty of finding work. Overall, only 29.7% of all returnees worked on return to Georgia. More men than women respondents had worked since return (a third of men versus a quarter of women). It should be noted, however, that the number of returnees who worked in the week prior to interview was even lower, at only a quarter of all respondents. The main reasons for not working reported by the respondents were the impossibility of finding work (almost 80%), household demands (5%), no need/wish to work (3.7%), illness (3.1%)

and reception of a pension or disability benefits (2.6%). Very few returned migrants (1.9%) were on holidays and would go back abroad. Most of the returnees who did not work were genuinely looking for paid work.

Respondents who worked on return managed to find a job within six months on average, with men doing so in slightly less time than women. The duration of migration had a somewhat positive relationship with the number of months elapsing before finding a job, whereas the opposite relationship held for education level. Better educated returnees appeared to be more likely to find a job quickly on return. Only 8.4% of those who found a job after return returned to the job they had before leaving. More than half of the respondents found jobs through friends or relatives (a practice still very common in Georgia, although less used among more educated respondents). One fourth of returnees found the job themselves, mainly through job advertisements.

Looking at the type of work performed by the returnees, most of those who were employed at the moment of interview were waged employees (79.7%), followed by 12.0% self-employed, 5.7% employers and 2.6% casual workers. Interestingly, the main features of the type and field of work on return seem to be similar to the work performed abroad (except domestic service). The main fields of employment for returnees were construction (21.4%), education (8.3%), transport (7.7%), commerce (8.0%), public administration (7.7%), manufacturing (6.6%) and petty trade (7.1%). Concerning the skill level of currently employed respondents, half worked as skilled workers, 30.6% as unskilled workers and 16.9% as professionals.

As for the migration experience as a potential facilitating factor for employment on return, 41.8% of returnees employed almost immediately on return (around 12% of all returnees) declared that their experience abroad helped them find a better job in Georgia. Moreover, the share of those who used their migration-related skills and experience in their daily work was 67.5% (around 20% of all returnees).

However, the survey shows that the work performed by returnees generally did not correspond to their education level on return, as it seems that they were mainly employed in the secondary labour market. Only 30.8% of returnees with higher education currently work as professionals in Georgia, half of them as skilled workers and 16.7% as unskilled workers. So it is not surprising that half of (working) returnees (mostly with professional or higher education) think that they have skills and abilities at a higher level than the work they currently perform.

4.5 FUTURE INTENTIONS

Survey findings reveal that close to half of returnees planned to go abroad again. Although the intention to re-migrate did not vary much by gender or education level, it obviously differed between those with and without employment in Georgia. Thus, over half of the unemployed respondents planned to go abroad, while only one third of those having a job expressed this intention.

Most respondents who wanted to remain gave personal reasons such as the wish to live with their family, relatives and friends, poor health, age and family problems. The legal barriers to working abroad and the absence of the necessary financial resources are mentioned by just 7.2% of respondents. Having a job/business in Georgia is mentioned by just 3.0% of returnees as a factor in staying. The main reason for leaving Georgia for a second or further time is the same: no job or unsatisfactory career prospects. Among highly educated persons, 8.5% would go abroad for education or training.

Our survey reveals that most of those who intended to go abroad again for work planned to do so in the near future: 73% in the next six months and another 20% in the next two years. Almost half of the respondents had the necessary financial resources to travel abroad.

The preferred destinations were Turkey, Russia and Greece followed by Italy, Germany and the USA. The vast majority of former migrants chose the same future destination (92% to Russia, 97% to Turkey, 89% to Greece and 63% to Germany). The main reasons for choosing the future destination was that they offered more jobs and income opportunities and the fact of having lived there before. Other decisive factors were knowledge of the language and having acquaintances in the destination country. While 48.1% of the migrants expected to work abroad as waged employees, 10.8% of males planned to be self-employed. Migrants were also prepared to work at a lower skill level: more than half of them expected to work as skilled or unskilled workers abroad.

4.6 MIGRATION AND RETURN OUTCOMES

It is known from previous studies that the migration experience of one household member increases the likelihood of other family members migrating. In our sample, 13.8% of the households with returnees had household members abroad; this was a slightly higher rate than among households with potential migrants. In general, families of returnees were slightly better off than families of potential migrants, with higher average monthly incomes (EUR 270 versus

EUR 233). This was not only due to remittances from abroad (EUR 16 per month on average) but also to higher monthly incomes from employment of family members (EUR 193 versus EUR 172) and higher household incomes from agriculture (EUR 15 per month on average).

The same is confirmed by the economic conditions indicator for the two different samples of respondents: the mean values for the sample of potential migrants and sample of returnees were 2.0 and 2.1, respectively, indicating a fairly similar situation for both groups. In both samples the indicator was slightly higher for households with male respondents and for households with better educated respondents. Similar conclusions can be drawn for the social conditions indicator. The mean values were higher for households with more educated respondents and for households where the returnees were employed at the moment of interview. However, the overall value of the social conditions indicator was almost the same (1.2) for both samples.

For a more detailed analysis of the above-mentioned issues, two special indicators were developed by the ETF (see Section 2.3), a migration outcome indicator and a return outcome indicator. The first indicator brings together variables reflecting the period of time spent abroad and aggregating different aspects of the returnee's legal and labour status abroad. The second indicator, which focuses exclusively on migrants' experiences since return, assesses the impact of labour migration on different dimensions of post-return employment and economic status. The indicators were calculated for all the respondents in our returned migrant sample. Based on the scores received, the returnees were classified into five outcome classes indicating gain/loss from migration (**TABLE 4.2**).

TABLE 4.2 RETURNEE DISTRIBUTION BY MIGRATION AND RETURN OUTCOMES (%)

| Classification | Migration outcome | Return outcome |
|--|-------------------|----------------|
| Highly successful migration/return | 0.6 | 0.6 |
| Successful migration/return | 54.3 | 44.8 |
| Neither successful nor unsuccessful migration/return | 39.8 | 46.5 |
| Unsuccessful migration/return | 5.0 | 8.1 |
| Extremely unsuccessful migration/return | 0.3 | 0.0 |

Note: Missing values account for 8% (migration outcome) and 19% (return outcome).

The migration experience abroad was considered successful or highly successful by almost 55% of the returnees in our sample and was considered unsuccessful or extremely unsuccessful by only 5.3% of the returnees. However, for almost 40% of returnees the migration experience made no difference. Migration seemed to be more successful for men than for women, as indicated by the slightly higher value of the indicator for male migrants; likewise for repeat migrants as compared to individuals having only one migration experience.

Concerning return outcomes (in comparison with migration outcomes), more returnees in our sample reported unsuccessful returns (8.1%) or neither successful nor unsuccessful returns (46.5%). The share of successful returns was 45.4%. Interestingly, although those who had migrated more than once had a slightly lower score on the return outcome indicator as compared to those who had migrated just once, the relationship between the number of migration experiences and the return migration indicator was not strong.

The reported results paint a somewhat optimistic picture of migration in Georgia. The composite indicators indicate that 55% of returnees had a successful migration experience abroad, while 45.4% of returnees experienced a positive impact on their lives on return. Most Georgian migrants benefited from the immediate impact of migration (remittances to families) but did not manage to use the migration experience and savings to improve their living standards on return, if possible permanently. Although we do not yet know the long-term impact, specific migrant support measures could certainly help improve the situation.

In this regard, it should be mentioned that the value of the return outcome indicator increased in line with education level (referring to current education level), with mean values of 2.2, 3.3 and 3.9 for respondents with low, intermediate and high education levels, respectively. Hence, the better educated a respondent, the more they benefit from successful return and from using their migration experience to improve their living standards in Georgia.

5. POLICY CONCLUSIONS AND RECOMMENDATIONS

Our survey indicates that almost one third of people aged 18-50 years living in Georgia intend to go abroad. Further analysis of the intention in terms of ability confirms that 11.4% of Georgians are ready to migrate at any moment. The tendency to re-migrate is particularly high among returnees (close to half) and a circular pattern is evident in almost one fourth of returnees who have had more than one migration experience. The intention to move abroad is highest among single young people (more men than women) with lower and upper secondary education (both general and vocational), among people from urban areas more than from the capital city Tbilisi and rural areas, and among those without jobs or with precarious and poorly paid jobs. Compared to prospective migrants, returnees are more typically middle-aged men, mostly from rural areas, generally married with children in the home country and with upper general secondary and higher education levels.

Although our samples of potential and returned migrants are not fully comparable due to the methodology used, the findings for the former seem to signal slightly changing trends in Georgia: the current propensity to migrate is lower for better educated people than for older educated generations, for whom it was more difficult to obtain work in the domestic market. Nevertheless, the main reasons for migration do not vary much between these two groups: unemployment, unsatisfactory wages, a lack of career opportunities and the need to improve living standards. Furthermore, due to the relatively high formal education levels of the Georgian population, migrants are relatively well educated by international standards (almost 30% have university education and another 30% have vocational education). Female migrants tend to be better educated than males: in both the potential and returned migrant groups, over one third of women compared to less than a quarter of men had university qualifications.

Destination countries are quite diverse. The top three destinations for returnees are Turkey (32%), Russia (29%) and Greece (13%), while the total EU share is around a quarter of all returnees. Returnees who migrate more than once are most likely to go to Turkey or Russia; the visa situation seems important as Georgians do not need an entry visa for Turkey. Females prefer to go to an EU country and males go more to CIS countries. People with low and intermediate education tend to go to Turkey or Russia, whereas better educated people tend to prefer the USA, Italy or Germany. Similar patterns can be observed in the sample of prospective migrants, where the most likely destinations are Turkey, the USA, Italy and Russia. Gender and education patterns are also similar but more accentuated: more educated people and more females intend to emigrate to the EU (44% of female prospective migrants) and the USA and half of them have university degrees. The difference in country preferences may signal the EU as an increasingly attractive destination, possibly attributable to the geopolitical orientation of Georgia and the difficulties to enter Russia.

Georgian migrants usually stay abroad for slightly under three years per migration period. The main reason for return is predominantly personal /family reasons, but difficulties regarding work and legal status also play a role. Hardly any prospective or returned migrant is aware of official programmes helping people to go abroad or return. Very few migrants receive any kind of pre-departure training (mostly language learning) or post-migration support on return, suggesting that many Georgian migrants arrive unprepared to the destination country and face many problems in the labour market. Most migrants rely on informal contacts and help from family or friends already living abroad. Indeed, help to find work (abroad or at home after return) is the service most in demand by migrants and 40% of migrants would attend pre-departure training if available. This picture confirms very limited opportunities and support measures for legal labour migration abroad and insufficient access by the general public to information concerning the few existing initiatives funded by the EU or other donors.

The main sectors of employment abroad are domestic service for female returnees (requested more in the EU countries) and construction for males (more in demand in the CIS countries). Most migrants work as waged workers, about 16% work as employers or self-employed and around 5% are employed in casual work. The vast majority (95%) of migrants work in skilled and unskilled jobs. Given the rather high educational profile of migrants, many people are likely to perform jobs abroad that do not correspond to their education and skills. Indeed, 48% confirmed that their work abroad was below their education level. This is more so the case of female migrants, characterised by a higher education level: 70% of the interviewed women worked as unskilled workers. Similarly, more migrants who had returned from EU countries worked below their education level. Some positive correlation exists between work level and professional education but only in the category of migrants with intermediate vocational education.

The skills mismatch may be explained by the fact that a higher proportion of less well educated people leave for countries outside EU and have more opportunities to find a better job relative to their education level. Another explanation is linked to the recognition of qualifications: almost 30% of interviewed returnees (more males than females) mentioned that their education qualifications were officially recognised in the destination country. This

recognition would partially facilitate a better correspondence between education and work abroad. Nonetheless, the main factors that contribute to the skills mismatch are the irregular status of many Georgian labour migrants in EU countries and the restricted range of jobs available to migrants. Relatively few of the respondents in our survey had an official work permit from relevant institutions (5%) or managed to obtain an official residence permit during their stay abroad (20%); around 14% had a written contract with employers abroad but very few were covered by a social security scheme (3%).

One positive consequence of migration is the skills and experience gained by migrants abroad. Our survey shows that 9.9% of interviewed returnees had studied or attended formal training while abroad, but most particularly, respondents with higher education (20.3%). A significant proportion took up language training (more females), followed by vocational training (equal among the sexes) and graduate/post-graduate courses (more females). As a result, one third of the respondents confirmed that they had acquired new skills and experiences while abroad, whether language skills (13.1%), vocational/technical skills (12.5%), workplace organisation, culture and ethics skills (9.4%) or entrepreneurship skills (5.4%).

Return is not easy for many Georgian migrants, as confirmed by the fact that only one third of returnees managed to find a job upon return and only one fourth worked at the time of interview. Even so, the returnees were slightly better off than the potential migrants in labour market. The fact that the work of returnees was about the same before and after migration seems linked to poor conditions of domestic labour market. In terms of current work, most returned migrants work as skilled or unskilled workers and mostly in the same sectors worked in abroad (except domestic service). With respect to type of work, most migrants are wage employees, although around 12% of returnees working after their return to Georgia specifically mentioned having started their own business. Regarding the migration experience as a facilitating factor for employment on return, nearly half of returnees employed upon return (41.8%) declared that their migration experience abroad helped them find a better job in Georgia (around 12% of all returnees). The share of those who use migration-related skills/ experience in daily work is 67.5% (around 20% of all returnees).

A number of composite indicators provide an overall assessment of the benefits of migration and return. Hence, 55% of returnees seem to have had a successful migration experience abroad, while 45% of returnees perceived a positive impact on their lives after return. Overall, 64% of returned migrants regularly sent remittances back to their families in Georgia, on average EUR 261 per month. Most remittances are spent on the living expenses of family and relatives; also mentioned are property purchases, education of children and debt repayment.

Half of returnees have not felt any impact of migration on their life on return to Georgia. More educated people tend to enjoy a more successful return than less educated people. This confirms that although a large share of Georgian migrants benefit from remittances, many do not manage to use their migration experience and savings to improve their living standards on return. Returnees seem unable to turn their experience abroad into a significant premium on the Georgian labour market despite the fact that they have far more work experience than peers who remain at home. Although this conclusion may be premature, as we do not as yet know the long-term impact, specific support measures could certainly help improve the situation of migrants. Therefore, a clear national migration strategy, complemented by concrete policies and measures for migrants implemented by the state and other bodies seems necessary to ensure more beneficial migration.

Our survey confirms the close links between sustained migration flows and insufficient employment opportunities and unsatisfactory work conditions in Georgia. Labour market conditions are the main factor affecting decisions by both potential migrants and returnees who are not fully able to take the advantages of their migration experience. Given the liberal economic policies of the government, more support for the creation of employment and job opportunities for citizens (including migrants) seems to be the most important priority. Better job opportunities, job-matching and placement services and labour market monitoring and management are necessary. So far most employment measures have been provided by donors with little public involvement, mainly the IOM via its job counselling and placement centres. However, concerted action in both policy areas is necessary.

Nevertheless, labour migration will probably continue as the only solution for many families, which survive thanks to remittances from abroad. Creating effective mechanisms for managing and monitoring migration flows is necessary for a win-win-win situation for all the parties involved. Increasing legal labour mobility through circular schemes may ensure greater benefits from migration and return. Our survey confirms that job search is the service most in demand by migrants. Thus, formal and properly functioning institutions providing job-matching services for job seekers and employers both at home and abroad are necessary. Given the many different kinds of problems experienced by migrants, more cooperation between the Georgian government, international donors and destination country authorities is needed. Indeed, most support services needed by migrants (before or after migration) are services that would benefit the whole population.

The EU-Georgia Joint Mobility Partnership agreement is an opportunity to exploit the benefits of labour migration for all the parties involved. More activities and joint projects could be activated under this framework to facilitate circular migration and mobility, along with migrant support measures before and after migration. The gradual liberalisation of

entry visas seems to be an important step towards circularity, while the signing of agreements on the labour and social security rights of migrants between Georgia and the main destination countries could improve conditions for beneficial migration and sustainable return (including portability of social benefits to the home country). The opportunities offered by circular migration also require new actions related to skills testing and validation and quality vocational training. In this regard, it is necessary to meet international skills standards and ensure qualified and competitive human resources in both the domestic and foreign labour markets.

Georgia needs a coherent and comprehensive migration strategy that is complemented by concrete policies and specific measures aimed at migrants. Clear roles and responsibilities for migrants need to be assigned to state and other bodies and the migration issue needs to be included in employment and training policies. As mentioned earlier, the State Migration Commission began drafting a migration strategy for the government at the end of 2010 which would ideally take into account all these dimensions of migration, with specific policy actions designed to address the challenges posed by migration and enhance the benefits for individuals and society.

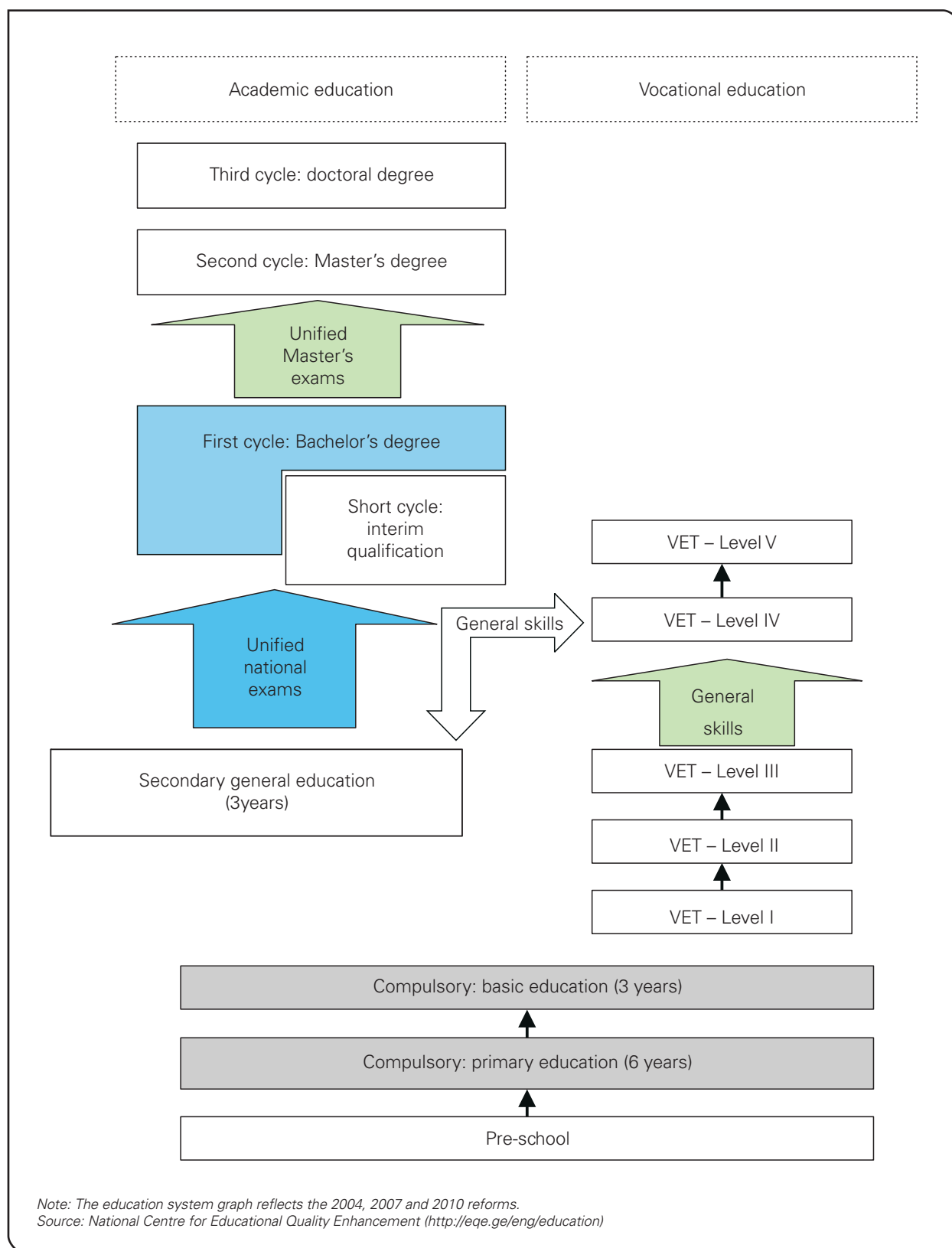
The fact that starting a business is very easy in Georgia in legislative terms may help attract migrants with money who want to return. As a stimulus, tax incentives and other kinds of privileges could be offered to people who want to start a business. The government needs to promote improved financing options, more entrepreneurship training, more cooperation with projects and institutions that support migrants and incentives for productive use of savings and remittances. Training programmes and access to micro-credit facilities for returnees are also necessary. Programmes should make special provisions for women in particular, as research shows that women (40% of the Georgian returnees in our survey) make the most effective use of remittances. It is also important to develop mechanisms for validating the skills acquired by migrants abroad.

In terms of concrete policy initiatives, the findings of this ETF migration survey suggest the following.

- Effective pre-departure training could be considerably expanded to address issues such as language skills, vocational qualifications and information about rights and obligations while working abroad.
- Better information about available jobs abroad and job/ skill matching services could help reduce skills mismatches in destination countries, e.g. via reinforced cross-national placement services (extension of the EURES job mobility portal).
- Comprehensive validation and recognition of migrant skills and qualifications in destination countries would reduce brain waste by ensuring better use of the skills of migrants.
- The potential of returnees for contributing to economic development in Georgia should be exploited through adequate return support schemes that promote sustainable return by individuals (in particular, schemes that validate skills acquired abroad and that provide effective job-search and placement services).
- Particular attention should be paid to the effective use of remittances and savings for business investment, given that entrepreneurial support of returnees is crucial in terms of improving poor labour market conditions.
- Specific civil society, NGO and institutional measures directed at families and communities are needed for vulnerable groups marginalised due to migration (e.g. single mothers and abandoned children) to help mitigate the negative social impact of migration.
- Permanent and temporary returnees and diaspora can both contribute to the formation of a middle class and to the economic development of Georgia via investments and the contribution of new labour market skills and also through socio-political learning and transnational networks.
- The strengthening of legal migration needs to take into account the motivations behind migration and return and should aim at providing legal ways for migrants to easily go back and forth between the home and destination countries.

ANNEXES

ANNEX 1. GEORGIAN EDUCATION SYSTEM



ISCED EQUIVALENCES

1. Georgian general education – three cycles:
 - 1.1 primary education: six years (ISCED 1)
 - 1.2 basic education (lower secondary): three years (ISCED 2)
 - 1.3 secondary (upper) education: three years (ISCED 3).
2. Georgian vocational education (no access to tertiary):
 - 2.1 levels I-III: at least 20 credits by level depending on the occupational standard (ISCED 3)
 - 2.2 levels IV-V: 60 credits by level, more or less one year per level (ISCED 4).
3. Georgian higher education – three cycles:
 - 3.1 first cycle: four or five years for bachelor qualification and short cycle for interim qualification (ISCED 5)
 - 3.2 second cycle (master): one or two years (ISCED 6)
 - 3.3 third cycle (doctor): three years (ISCED 6).

ISCED – International Standard Classification of Education

ANNEX 2. OVERVIEW OF EXISTING MIGRATION PROJECTS

The International Organisation for Migration (IOM) has the longest history with migration programmes in Georgia. Most of its activities are implemented through seven job counselling centres which form the employment facilitation network. The main activities implemented by this network are listed below.

Job counselling/referral, and outreach to employers. Job counselling is essential for identifying and addressing qualifications and skills needs as demanded by employers. The IOM has created a database of 16,000 job seeker profiles and organised two job fairs during 2011 in Tbilisi and Batumi in tourism and services, two fields very much promoted by the government.

- Qualifications/skills development. Vocational training is provided and linked to the development of marketable skills among the project beneficiaries.
- Micro-financing. Support is provided for small business start-ups and development so as to develop the small business sector and provide additional job opportunities. According to Manana Amonashvili, coordinator of the regional job counselling and placement centre in Gori, the lack of successful small business activities is due to both a lack of money and a lack of knowledge and skills necessary to set up and expand a business. The job counselling and placement centres provide special training before granting money for business initiatives. Although the amount of grant money (USD 1 000-2 000) is small, the practice works well.

However, funding for the job counselling centres will finish soon and their future is not clear. It is important to emphasise their role as functional equivalents of the public employment services that are still lacking in Georgia. In view of the need for additional funds to sustain these centres, the central government is not willing to take them over as yet. IOM has started to negotiate with some local authorities in the regions on this issue and for the moment it has been decided that the government of the autonomous region of Ajara will support the functioning of job counselling and placement centres in Batumi and the municipality of Rustavi will also give support to such local centres.

The IOM also manages and coordinates another EU project with the United Nations called the Joint Migration and Development Initiative (JMDI), funded through the EU's Thematic Programme for Cooperation with Third Countries in the Areas of Migration and Asylum. The initiative was launched by the IOM in February 2010 and four different sub-projects are being jointly implemented by the United Nations Development Programme (UNDP), the United Nations High Commissioner for Refugees (UNHCR), the International Labour Organisation (ILO), the United Nations Population Fund (UNFPA) and the IOM.

The JMDI projects funded in Georgia have a countrywide scope as well as a regional focus. They aim to find new ways of making migration work for economic development, with particular emphasis on maximising regional development in the Imereti region and in Poti (EUR 735 000), via the strengthening of links with diaspora to facilitate business development, promoting cooperation between migrant communities and local authorities to contribute to socio-economic development at the community level, improving skills and qualifications of returned migrants and integrating returnees into the labour market. The projects are implemented by selected civil society organisations in partnership with their respective EU based counterparts from the Netherlands, Germany and Latvia.

One JMDI project (Integration of Georgian Migrants into the Labour Market) is implemented by the Georgian Employment Association in cooperation with a German Employers' Association. The project, which targets highly qualified returnees and IDPs, aims to develop their capacities and improve their integration in the labour market, so that the target group stays in their country of origin. A database is being created of returnees for the future. According to the information provided by the Georgian Employment Association, the project, with the help of the ILO, supports small business initiatives and tries to improve the existing business environment for Georgian returnees. It also provides counselling, guidance and job placement services to potential migrants to discourage them from emigrating. So far, 85 returnees and IDPs have been employed via the Georgian Employment Association and 17 people have started their own business within the project.

The Georgian Employment Association is active in reintegrating returnees and providing them with assistance in matching their skills with domestic labour market demand. It helps affiliates and different business organisations in filling job vacancies and provides skills training to returnees. Their activities have been particularly successful in the Imereti region. As the Georgian Employment Association has over 800 corporate members, it has the capacity and practical tools to monitor labour supply and demand. Returnees are thus trained and acquire professional skills to work in jobs in demand. One of their recent successes was the employment of 42 returnees and IDPs in a big supermarket called Goodwill in Tbilisi.

Three other projects belonging to the same initiative described below, although information concerning implementation of these projects is lacking.

The Georgian Diaspora for Development in Kutaisi project encourages entrepreneurship and enhances entrepreneurship skills by providing business and management training for people in the city of Kutaisi as well as among the diaspora in the Netherlands. It also supports small and medium enterprises (SME) in Kutaisi. Activities include: (i) creation of a website and database for Dutch and Georgian SMEs; (ii) creation of a managerial/entrepreneurial training programme for Georgian professionals; and (iii) the setting up of SME helpdesks in Kutaisi.

The Turnaround Migration for Development project also has a regional focus in the city of Poti in western Georgia. Its aim is to use the knowledge and experience of Georgians and foreign migrants to train 20 trainers. The top ten trainers will be employed by the Poti Professional Retraining Centre where they will train a minimum of 200 individuals in the five most in-demand occupations. The training programmes and methodologies will be designed by Dutch universities. Within three years a minimum of 600 citizens will share the knowledge and practices of skilled migrants with experience of European companies and organisations. Information about trained individuals will be collected in a databank and shared with major employers in Poti.

The project called Promoting Cooperation among Migrant Communities and Local Governments for Local Development focuses on capacity improvement of local authorities through the development of a migration system in the region of Imereti, so as to make better use of the capacities of migrants and their communities for social and economic development at the community level. The project includes an information campaign aimed at local communities in the Imereti region, the creation of migration offices by local authorities and the provision of training to develop operational procedures that ensure local authority efficiency.

The ILO is also implementing a project to enhance protection of migrant workers in Russia and the economic impact of migration in Armenia, Azerbaijan and Georgia. Its main objective is the protection of migrant workers and the promotion of well-managed labour migration. According to the information provided by its coordinator (Gocha Aleksandria), the project includes components on information dissemination, enhancing the role of private recruitment agencies in well-managed labour migration and strengthening state support services for migrant workers. This project is being implemented in close collaboration with the Targeted Initiative for Georgia project and many activities of the teams are jointly organised. These include research on migration and development and information concerning national workshops, consultations and trainings of state officials related to migration. ILO and Targeted Initiative for Georgia also jointly organised a conference on Management of the Labour Market and Circular Labour Migration, held 27-28 September 2011 in Bazaleti.

ANNEX 3. REPRESENTATIVENESS OF THE SAMPLE OF POTENTIAL MIGRANTS (18-50 YEARS)

| Breakdown | Census 2002 Population 18-50 years (%) | Potential migrants Sample 18-50 years (%) |
|----------------------------|--|---|
| Sex | | |
| Male | 48.0 | 38.7 |
| Female | 52.0 | 61.3 |
| Education level | | |
| Primary and less | 2.7 | 0.7 |
| Lower secondary | 6.3 | 12.1 |
| Upper secondary general | 39.0 | 28.8 |
| Upper secondary vocational | 20.9 | 15.1 |
| Post-secondary vocational | 5.4 | 10.9 |
| Bachelor and master degree | 25.5 | 32.3 |
| PhD | 0.3 | 0.3 |
| Residence | | |
| Capital city (Tbilisi) | 26.3 | 25.5 |
| Other urban | 28.6 | 27.4 |
| Rural | 45.1 | 47.1 |

ANNEX 4. ISCO EQUIVALENCES

| Major ISCO groups | Classification for potential/returned migrant surveys |
|---|--|
| 1.11. Legislators and senior officials | 2. Senior management |
| 1.12.10. Directors and chief executives | 2. Senior management |
| 1.12. (excl. 1.12.10) Corporate managers | 3. Middle management |
| 1.13. General managers | 3. Middle management |
| 2. Professionals | 1. Professionals |
| 3. Technicians and associate professionals | 4. Skilled workers |
| 4. Clerks | 4. Skilled workers |
| 5. Service workers etc. | 4. Skilled workers, except for subgroups 5131, 5133, 5142, 5145, 5210, 5220* |
| 6. Skilled agricultural and fishery workers | 4. Skilled workers, except for subgroups 6113, 6122, 6123, 6130, 6141* |
| 7. Craft and related trade workers | 4. Skilled workers, except for subgroups 7123, 7412* |
| 8. Plant and machine operators and assemblers | 4. Skilled workers, except for subgroups 8322, 8331* |
| 9. Elementary occupations | 5. Unskilled workers |

Notes: ISCO – International Standard Classification of Occupations; (*) Subgroups are classified as unskilled workers.
Source: for ISCO see <http://laborsta.ilo.org/applv8/data/isco88e.html>

ABBREVIATIONS AND ACRONYMS

| | |
|-----------------|--|
| BCG | Business Consulting Group |
| CEPR | Centre for Economic Problems Research (Georgia) |
| CIESR | Caucasian Institute for Economic and Social Research (Georgia) |
| CIPDD | Caucasus Institute for Peace, Democracy and Development (Georgia) |
| CIS | Commonwealth of Independent States |
| CRRC | Caucasus Research Resource Centres (Georgia) |
| EBRD | European Bank for Reconstruction and Development |
| ETF | European Training Foundation |
| EU | European Union |
| EUR | Euro |
| GDP | Gross domestic product |
| GEL | Georgian lari (national currency) |
| Geostat | National Statistics Office of Georgia |
| GIZ | Deutsche Gesellschaft für Internationale Zusammenarbeit |
| IDMC | Internal Displacement Monitoring Centre |
| IDP | Internally displaced person |
| IFAD | International Fund for Agricultural Development |
| ILO | International Labour Organisation |
| IMF | International Monetary Fund |
| IOM | International Organisation for Migration |
| ISCED | International Standard Classification of Education |
| ISCO | International Standard Classification of Occupations |
| ISSET | International School of Economics at Tbilisi State University |
| Midpocra | Ministry of IDPs from the Occupied Territories, Accommodation and Refugees (Georgia) |
| NGO | Non-governmental organisation |
| OSGF | Open Society Georgia Foundation (Georgia) |
| UN | United Nations |
| UNDP | United Nations Development Programme |
| UNESCO | United Nations Educational, Scientific and Cultural Organisation |
| UNFPA | United Nations Population Fund |
| UNHCR | Office of the United Nations High Commissioner for Refugees |
| USAID | United States Agency for International Development |
| USD | US dollar |
| VET | Vocational education and training |

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