MIGRATION AND SKILLS IN ARMENIA, GEORGIA AND MOROCCO

COMPARING THE SURVEY RESULTS

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PREFACE

The European Training Foundation (ETF) has a long-standing interest in the relationship between international migration and human capital in the European Union's (EU) neighbouring countries. This key relationship is central to any consideration of migration and economic development and is of vital importance to labour markets, particularly in countries with high rates of emigration or immigration. Previous ETF migration surveys in Albania, Egypt, Moldova, Tunisia and Ukraine, conducted in 2006 and 2007, provided empirical information on those countries. They also established the value of a new survey instrument (ETF, 2008; Alquézar et al., 2010; Bardak, 2010).

In 2011, building on its prior experience in skills and migration studies, the ETF developed similar surveys to investigate the relationship between migration, development and skills in three countries: Armenia, Georgia and Morocco. This report presents a comparative analysis of the data collected. It analyses the results of three countrywide surveys conducted between October 2011 and July 2012 involving interviews with 12 000 respondents (both potential migrants and returned migrants). It supplements the more detailed country reports on Armenia, Georgia and Morocco.

The ETF surveys focus particularly on the connection between qualifications and labour migration. They provide data on the qualifications of both potential and returned migrants; whether these qualifications were used while working abroad; whether new qualifications were added during the stay abroad; and to what extent the qualifications of returned migrants are being used in the domestic economy and labour market. This data is used to assess the extent of brain gain, brain drain and brain circulation, three key factors in the evaluation of the overall costs and benefits of migration.

The surveys provide evidence that can be used by policy makers in the three countries and the EU to design supportive policies and instruments. The EU signed mobility partnership agreements with Georgia in November 2009, with Armenia in October 2011 and with Morocco in June 2013. These partnerships provide a framework for dialogue and cooperation on migration and development; legal migration and mobility; asylum; and the fight against illegal migration. Two dimensions that are relevant for this analysis are improving opportunities for legal migration and maximising the benefits for all parties. The ETF survey data allows the authorities to focus their interventions on areas where they are most needed, such as pre-departure training for migrants and the use of returned migrants' qualifications in the domestic economy.

This report was jointly drafted by a team of experts: Dr Michael Collyer (senior lecturer at the University of Sussex) who was contracted by the ETF, Ummuhan Bardak, Eva Jansova and Outi Kärkkäinen from the ETF. Valuable comments and suggestions were received from ETF peer reviewers Anna Kahlson and Michael Graham, after which the report was finalised by the ETF migration team.

EXECUTIVE SUMMARY

The relationship between international migration and human capital is central to any research on migration and economic development. It is also of vital importance to labour markets, particularly for countries with high rates of emigration or immigration. The ETF has supported original research on this topic in a range of key partner countries over the last six years. This report presents a comparative analysis of recent large-scale surveys on migration and skills conducted between October 2011 and July 2012. A total of 12 000 interviews were held in Armenia, Georgia and Morocco as part of these surveys.

All three countries have strong relationships with the EU, particularly in terms of migration dialogue. Georgia (2009), Armenia (2011) and Morocco (2013) are among the four states that have signed a mobility partnership with the EU. However, migration history in Morocco dates back to the early 1960s when the country first signed labour agreements with some European countries, which still remain the main destination for Moroccan migrants (84%). Despite periodic intra-Soviet movements in the past, migration is a relatively new phenomenon for Armenia and Georgia, starting only after 1990. Moreover, the main destination has been Russia, which is still the destination for 85% of Armenian migrants, rather than the EU. Georgians migrate to a more diverse range of countries following the deterioration of political relations with Russia.

In general, labour market conditions are difficult in all three countries. Issues include a high share of agricultural employment (40% and higher); a high level of precarious employment and/or informality in all economies; high rates of unemployment (varying between 10% and 18%); and particularly high rates of youth unemployment (varying between 32% and 39%). All of these conditions create a significant push factor for economic emigration, which has resulted in significant stocks of migrants abroad (varying between 10% and 25% of their population). Economic dependency on migrants' remittances is high, while diaspora communities from Morocco (concentrated in Europe) and Armenia (concentrated in the USA and France) are quite large.

The skill pool of migrants differs considerably between Morocco on the one hand and Armenia and Georgia on the other. Overall education levels are low among the Moroccan population aged 15+: 80% of people have primary or basic education, 12% have a medium level of education and only 7% have higher education. In contrast, overall education levels are high among the Armenian and Georgian populations due to the Soviet legacy. On average, one-quarter of the population in both countries has a university degree, while almost two-thirds completed upper and post-secondary education. Thus, around 10% of people in both countries have a low level of education. These differences in education and skill pool create different dynamics in the interaction between migration and human capital.

The ETF is interested in discovering the conditions under which the benefits of migration are increased. It focuses particularly on the development impact of migration and on matching skills to jobs to facilitate legal mobility and skill development policies. As the EU mobility partnerships prioritise temporary and circular migration and envisage new measures for legal migration, mobility and development, the ETF has identified six questions concerning the relationship between migration and human capital that underlie the current EU approach. As explained in Chapter 2, this report analyses the migration survey data from Armenia, Georgia and Morocco to discuss those questions, ranging from the very broad to the relatively specific, and investigates how human capital development is affected and utilised in such migration systems.

The three countries have very different migration systems. There is some similarity between the neighbouring countries of Armenia and Georgia. Russia is the most significant destination in both cases, overwhelmingly so in Armenia, although similar numbers of Georgians migrate to Turkey and Greece. More than 80% of Moroccan returnees reported spending time in a European country and the intended destinations of potential migrants are very similar. Patterns of migration are also very different. Armenian returnees report regular, circular movements of relatively short duration. In Georgia, migrations are less frequent and slightly longer. In Morocco, the average reported first migration lasted almost 10 years. Despite common destinations in Europe and Russia, the best and the brightest from all countries tend to prefer the USA and Canada as their main destinations. Some EU countries are also attractive for better-educated migrants from Armenia and Georgia.

Migration is an attractive idea to many people, particularly young men with relatively fewer family links at home. However, the realities and patterns of migration vary in the three countries. Although the main reason for migration is overwhelmingly economic, a sizeable minority migrates for education and training purposes, particularly in Morocco. Return is typically related to family issues. By and large, the education and skill levels of migrants reflect the overall education levels of the populations, but interest in migration increases from primary to secondary education in all three countries.

Education is a significant focus of the research and a major objective of the project is to try to untangle the complex relationship between education and migration. There are five clear findings. First, education is linked to the intention to migrate. A pattern exists in all three countries which is best described as an 'education hump'. This pattern shows that intention to migrate is low among those with the lowest education level, rises for those with primary and secondary schooling and falls again for those with higher education. Second, education is linked to the potential to migrate. In Armenia, and especially in Morocco, those with higher levels of education also have greater access to the social networks, documentation and languages needed to facilitate migration, so those for whom it is easiest to migrate have the lowest intention to migrate. This pattern is reversed in Georgia.

Third, migration itself is a tool for education and leads to a modest 'brain gain', particularly in Morocco where education levels are low. In Morocco, larger numbers of migrants pursue education abroad and migrants' formal education improves during the migration process. Fourth, those with higher levels of education are better able to benefit from return migration. The impact of a higher level of education during the migration period is not as clear, probably because larger numbers of migrants work below their education levels. Finally, some migrants from all three countries, but particularly Morocco, report using remittances to finance the education of others back home, so migration makes a contribution to the human capital of non-migrants.

Unemployment increases the likelihood of migration in all countries, particularly for men. On the other hand, having a job does not prevent migration but actually facilitates it, especially in Morocco. The work performed abroad by the returnees shows that limited types of jobs are available only in certain sectors and indicates a relatively high mismatch of education and skills at work, especially for the Georgian and Armenian migrants. The migration experience increases activity and employment levels upon return, most visibly for women and for Moroccans. The level of entrepreneurship increases significantly in Morocco, while labour market reintegration after return remains limited in Armenia and Georgia. Thus, migration is an individual project which largely ends with successful outcomes. However, return outcomes are less successful in Georgia and Armenia, also proven by the similar economic and social conditions after return. Despite these difficulties, the overall impression of the impact of migration is positive and the very significant level of interest in emigration in all three countries is shown to be rational.

The results of the analysis on the six research questions mentioned above are presented below.

- **Does seasonal, temporary or circular migration bring more benefits to migrants?** Relatively shorter and circulatory movements, typical in Armenia, seem to lead to successful migration outcomes, while the data from Morocco and Georgia does not support the benefits of shorter migration periods.
- **Does the education level increase the benefits of the migration experience?** Higher education leads to more benefits arising from the migration experience if there is a correspondence between the education level and the work performed abroad. This is the case for Morocco, but not for Armenia and Georgia, where there is a higher mismatch. However, higher education enables better use of the migration experience upon return and makes returning more successful.
- **Does migration lead to any brain gain?** Migration leads to a modest brain gain in many subtle ways, particularly in Morocco where education levels are low. A significant share of migrants learn new skills and experiences abroad, both formally and informally. In particular, they learn vocational and technical skills, language skills, work organisation skills and ethics in all countries. But most of these new skills are never certified or truly visible in the domestic labour market when the migrants return.
- **Does work experience abroad improve the labour market chances of returnees at home?** Migration experience itself activates people and increases employment levels upon return in all countries, especially for women. Indeed, returnees have similar or higher activity and employment levels compared to other groups in all countries. The most visible impact is in Morocco, signalling the positive effects that the migration experience has on the labour market and the level of entrepreneurship.
- **Does migration improve the socio-economic conditions of migrant households in a sustainable manner?** Migration clearly improves the economic and social conditions of returnee households in Morocco, but households with current migrants abroad are better off than households with returnees or no current migrants in Armenia and Georgia. This shows that migration gains are not sufficiently sustained to improve living standards upon return.
- **Can migrant support measures before departure and after return lead to more successful migration outcomes?** Little evidence is available on effective measures that systematically help migrants before migration or after return. But there is a high demand for such policy measures and help in finding a job is the most needed support both before migration and upon return to the home country.

Overall, the above results show that migration has been more likely to be a success story in Morocco than in the other two countries. A number of factors seem to reduce the costs of migration and increase the benefits: Morocco has a longer history of migration; the nature of migration is relatively more regular and longer in duration; migrants travel mainly to EU destinations; and larger migrant networks (diaspora) are present abroad. Moreover, there is a relatively better match between the education level and the type of job performed abroad, mainly due to the overall

lower education levels of Moroccan migrants. Thus, the low starting levels of migrants in terms of education and skills and the limited number of highly educated migrants seem to contribute to higher success rates in Morocco.

On the other hand, migration is a more recent phenomenon in Armenia and Georgia. The migration experience is much shorter in duration and more irregular in nature. There is a greater variety of destinations (with Russia being the most popular) and fewer migrant networks in those destinations. In spite of or because of the overall higher education levels of migrants, the match between their education levels and jobs performed abroad was quite low for the two countries, particularly for Georgia. The lower success rate in Georgia can be further explained by the higher share of female migrant workers who are generally with higher education but work mostly in low-paid sectors abroad (i.e. domestic work). Educated women migrants who emigrate for work reasons seem to be the most disadvantaged group.

The findings suggest a demand for policy measures to support migrants before departure in order to ensure a more efficient job and skills-matching process. Upon return, instruments are needed to facilitate migrants' labour market reintegration and support them in their entrepreneurial activities. Other policy measures related to education and skills are required to develop mechanisms to validate the new skills and experiences acquired abroad by migrants, which can then be used as an advantage in the domestic labour market upon return. At the same time, more attention should be paid to the recognition mechanisms of qualifications abroad, not only for highly educated individuals, but also for those with medium education levels and vocational education and training (VET) qualifications. Thus, specific policy actions are needed in the areas of employment, skills and labour market integration of migrants to decrease the costs and increase the benefits of migration. These support measures can contribute to more successful migrations and returns, with more developmental benefits for the countries of origin.

1. COUNTRY BACKGROUNDS

Both Armenia and Georgia are former Soviet republics. Although both countries experienced net immigration for much of the 20th century, economic decline, which started in the 1980s and worsened after the collapse of the USSR, resulted in increasing emigration. Both countries now have very high net emigration rates and are economically dependent on the remittances sent home by migrants. Although Morocco is different in almost all respects, one of the few commonalities between Armenia and Georgia on one hand and Morocco on the other is a similar economic dependence on emigration. Nevertheless, migration from Morocco has a very different history and has been managed in ways that reflect the historical and political differences between the countries.

Armenia gained independence from the Soviet Union in 1990 and Georgia followed suit one year later. Like most former Soviet republics, both countries experienced significant emigration immediately after independence, chiefly of ethnic minorities (mostly Russians). In 2010, the population of Georgia was estimated at 4.7 million, a decline of 20% since independence. Likewise, the population of Armenia declined by almost one million (approximately 25%) after independence to an estimated 3 million in 2010. Quite apart from recent history, there are many similarities in how these two neighbouring countries have been affected by international migration. Morocco is a much larger country, whose population was estimated at over 32 million in 2011. Fertility has now declined to 2.3 children per woman with an annual population growth of 1%. An estimated 190 000 young people still enter the labour market every year.

Following independence in 1991, Georgia faced a series of political crises that devastated its economy and had a dramatic impact on migration patterns. Post-independence migration has been marked by three distinct stages. During the first four years of independence, economic collapse and conflict gave rise to the most dramatic period of mass emigration. Between 1995 and the Rose Revolution in 2003, the economic situation remained very poor and international migration was one of the solutions for many Georgians seeking employment. Since 2004, many economic indicators have improved. Nevertheless, evidence, including ETF studies (Bardak, 2011a; and 2011b), shows that labour market indicators continue to deteriorate.

According to Georgia's National Statistics Office, the 2011 employment rate in the country was 55.4%. The official unemployment rate was 15.1%, although the real figure is thought to be higher due to high underemployment in subsistence agriculture. The official employment figures include people who work in their own households. The category of self-employment includes people working for as little as one hour a week on a plot of land. The International Labour Organisation has estimated the real unemployment rate at between 30% and 35% (ILO, 2010, p. 44). Youth unemployment is also high (35.6% in 2011) and tends to be higher among urban and better-educated youth. Overall, more than 50% of employment is in agriculture, a sector characterised by low productivity and scant social protection. These statistics are an indication of the large number of people who are living precariously.

Today, migration plays an essential role in the Georgian economy and is driven mainly by high unemployment. Migration statistics were disrupted in the post-independence crises and data collection is still problematic; it is thought that much migration still goes undocumented. Nevertheless, we do know that temporary migration involves between 6% and 10% of the population annually and that migrant stocks abroad amount to more than one million people (more than 20% of the population). There is evidence that the number of women involved in international migration is increasing: surveys in 2000 and 2001 found that women accounted for between 33% and 40% of international migrants (Badurashvili, 2001; Dershem and Khoperia, 2004; and IOM, 2002). Dependence on migration is significant: the 2006 Georgian Integrated Household Survey found that 5% of all households received remittances, accounting for half of their budget.

Armenia has a very significant and ancient diaspora that is estimated at around 8 million people. This compares to a national population of just over 3.2 million in 2010. The diaspora population includes many generations of migrants and the most recent flows of people born in Armenia are still substantial: 870 200 migrants were registered as living out of the country in 2010 (28.3% of the total population). A pattern of labour migration became established in the 1960s, and by the late 1980s the outflow was approximately 40 000 people a year (1% of the population). The data on these movements is thought to be accurate until 1988, when voluntary registration systems began to collapse. As in Georgia, accurate data collection on migration was not established in Armenia until more than 10 years after independence, and even current statistics are not altogether reliable. Independence in Armenia was followed by a period of instability that lasted until 1995, with stability returning only gradually by 2001.

Today, Armenia's labour market is quite similar to Georgia's labour market. In 2011, the total employment rate was 51.4%, with unemployment at 18.4%. Youth unemployment is particularly high (39% in 2010) and tends to be higher among women and urban and better-educated youth. Moreover, the rate of informal employment (self-employment and unregistered employment) is very high. It accounts for 59.2% of the total working age population (ILO, 2011). As in Georgia, agriculture is the largest employer. In 2010, it accounted for 40% of total employment but only 17% of gross domestic product (GDP), indicating the large share of subsistence in this sector (Bardak, 2011a). The 2010 labour force survey showed that 19% of all employment in Armenia takes the form of temporary, seasonal, occasional or one-off activities. A sizeable proportion of the population therefore has no social protection except whatever they can provide for themselves.

Armenia is unusually dependent on remittances. From 2003 to 2007, remittances accounted for between 17% and 24% of GDP, and some 36% of all households in the country received remittances. Since independence, Armenia has sought to safeguard continued emigration through bilateral agreements on migration with four destination countries (Georgia, Russia, Ukraine and Belarus), although implementation is not always effective. It has also signed readmission agreements with ten countries since independence, including several EU Member States.

Morocco has been independent far longer than Armenia or Georgia and current migration patterns were initiated even before independence from France in 1956. Formal labour migration agreements were signed with France, the former West Germany, Belgium and the Netherlands during the 1960s. This established the geography of emigration that remains relevant: strongly concentrated in Europe but, unlike neighbouring Algeria and Tunisia, diversified away from the former colonial power, France. Instead, most migrants move to a number of other European countries. Estimates of the number of Moroccan citizens who are resident outside the country vary widely. Data from the Moroccan government (Direction des affaires consulaires et sociales) puts the figure at the higher end of the scale: 3 473 209. This is due to the practice of counting the children of migrants born abroad who are obviously excluded from the immigration statistics of destination countries. The World Bank estimates emigrant stocks at 3.01 million (9.5% of the Moroccan population).

Moroccan data clearly shows the concentration of emigration in Europe, with 84% of migrants resident in a Member State of the EU. As a result, the history and development of migration patterns from Morocco has been closely tied to changing policy developments in Europe. Large-scale migration was initiated by the labour migration agreements in place from 1963 onwards. This period lasted until the end of primary labour migration to the key Northern European destination countries in the early to mid-1970s. As is now well known, this change of policy did not stop migration but simply initiated a change in the migrant profile. As family reunification became established from 1976 onwards, a movement involving a majority of women and children replaced the male-dominated migration of the previous decade. From the late 1980s onwards, Spain and Italy opened up as new destinations for Moroccan migrants. As immigration restrictions to most European destinations began to tighten again in the 1990s, a new undocumented movement became established, incorporating non-Moroccan migrants by the end of the 1990s. In recent years, a new trend of permanent immigration is perceptible in Morocco, mostly from sub-Saharan African countries.

Like Armenia and Georgia, agriculture is the most significant sector in the Moroccan economy, accounting for 40% of employment and 15% of GDP (Martin and Bardak, 2012). In addition to agriculture, the Moroccan economy is dominated by traditional micro and small enterprises, mostly in petty trade, commerce and construction. Jobs in these sectors are relatively unproductive and demand few skills. Overall, 80% of workers do not have any social protection. The total employment rate was only 46% in 2011, though this hides marked differences between the sexes: the employment rate among men was 74.3% but only 25.5% among women. Unemployment rates are also unevenly distributed. In 2011, the overall unemployment rate was 9.6% but this varied widely. Unemployment among young people (aged 15 to 24 years) in urban areas was 32.2%, falling to 8.7% for the same group in rural areas, though considerable underemployment is hidden in rural areas. A further concerning trend is graduate unemployment; those with at least a higher education diploma face much higher unemployment rates (18.3%) than those without a diploma (7%). This reflects the structure of the Moroccan labour market, which creates very few 'quality jobs' (ETF, 2012).

Morocco receives among the highest rates of remittances of any country in the world, both in absolute terms and relative to GDP. According to the World Bank's most recent data, GDP was USD 90 billion in 2010 and Morocco received USD 6.4 billion in remittances. Throughout the 1990s, remittance receipts fluctuated between MAD 16 and 19 billion (approximately EUR 1.5 to 1.8 billion), but it was really after 2000 that significant and sustained growth occurred. Thus, remittances constitute almost 10% of GDP and are the most significant source of foreign exchange for the country (Khachani, 2011).

In summary, all three countries share the same difficult labour market conditions at home (high agricultural employment, large informality and precariousness, unemployment), creating strong economic push factors for migration. Apart from the longer history of migration in Morocco compared to the relatively new migration history of Armenia and Georgia, the skill pool of migrants differs considerably between Morocco on the one hand and Armenia and Georgia on the other. The overall education levels of the Moroccan population aged 15+ is low: 80% of people have primary or basic education, 12% have a medium level of education and only 7% have higher education. According to UNESCO, more than 40% of the population was illiterate in 2010. This figure went down to 20% among young people. Moreover, the share of people with vocational training at secondary and post-secondary level is extremely small (around 5%).

In contrast, the overall education levels of the populations in Armenia and Georgia are impressively high. This is possibly due to the Soviet legacy. On average, one-quarter of the population has a university degree in both countries (the rate is higher in Georgia). In addition, almost two-thirds of both populations complete upper secondary and post-secondary education, while a majority graduate from vocational education. Around 10% of people in both countries have a low level of education. Education levels increase further when the 18 to 50 age group is sampled (one-third has higher education). As can be expected, the differences in education and skill pool in the three countries are reflected in the composition of migrant flows from these countries, although they also create different dynamics in the interaction between migration and human capital.

Finally, all three countries have long-standing relationships in the migration field with EU institutions. Morocco's relationships go back the furthest, even before it applied to join the EU in 1986. The current Association Agreement dates back to 2000 and was expanded to cover Morocco's participation in the European Neighbourhood Policy. In 2008, this relationship was further strengthened when Morocco was awarded 'advanced status'. It was the first country in the region to receive this status, which facilitates forms of closer cooperation. Both Armenia and Georgia established official contact with the EU soon after independence. Both countries are now also partners in the EU's Neighbourhood Policy. Relations with the EU were initially regulated by partnership and cooperation agreements, which entered into force in 1999 in both cases.

The European Commission's country strategy papers for 2007-13 for all three countries highlight migration as a priority area within the field of justice, freedom and security. The positive relationship between the EU and Morocco, Georgia and Armenia is further highlighted by the fact that all three countries have signed mobility partnership agreements with the EU: Georgia in 2009, Armenia in 2011 and Morocco in 2013. Overall migration, and particularly the relationship between migration and human capital, is of significant strategic importance for all three countries and for their relations with the EU.

2. HUMAN CAPITAL AND MIGRATION

The relationship between human capital and migration, and particularly the impact of migration on development, has always been a central issue in migration policy. Over time, with a broader understanding of migration and development, the standard view of this relationship changed from a highly pessimistic position to a more optimistic view. It is now perhaps returning to a more nuanced position that takes into account the full complexities of the issues involved (de Haas, 2010). The earliest discussions on the impact of international migration on development (e.g. Adams, 1968) were marked by concerns about brain drain. The concern expressed was that international migration would involve a substantial loss of human capital in the countries of origin and was therefore a drain on state investment in education.

This predominantly negative view was challenged in subsequent decades. Although high-skilled migration continued, the mass migrations of the 1960s and early 1970s involved predominantly low-skilled individuals, who represented a lower investment on the part of their state of citizenship. Population growth and the gradual spread of simple mechanisation meant that not only was the migrants' labour not missed in their home communities, but they were also typically unemployed or underemployed before they left. This situation did much to assuage concerns about brain drain, and the position of governments in the countries of origin regarding the outflows of low-skilled migrants became increasingly ambivalent.

Two further developments did much to transform this ambivalence into greater enthusiasm. The first of these was the growing appreciation, through the 1980s and 1990s, of the reliability and amount of the remittance transfers sent home by migrants. Remittances demonstrated that international migrants were not 'lost' to their countries of origin but could still make a substantial contribution. Some countries took the strategic decision to train more people in certain professions than the domestic labour market could absorb, thereby investing in emigration in the hope of continued returns through remittances. The Philippines' approach to training nurses is probably the best known example, but the principle that effectively managed labour markets can cope with even a significant amount of high-skilled migration is now widely accepted.

The second change over this period was the realisation that migration did not have to be permanent. Permanent emigration, even of highly skilled individuals, was not inevitable and the return of migrants provided an opportunity for the country and community of origin to benefit from their skills. The ideal scenario suggested that migrants' skills could be enhanced by the training or experience they received abroad and that migration, far from being a brain drain in fact represented a brain gain (Stark et al., 1997). Temporary return programmes, such as the United Nations Development Programme's (UNDP) Transfer of Knowledge through Expatriate Nationals (TOKTEN), sought to capitalise on this brain gain.

While the positive conclusions of the brain gain argument represent an important correction to the previous, very negative, perception of migration as brain drain, the argument does tend to represent a somewhat idealised vision of the migration process. No doubt some highly skilled migrants find work abroad at an appropriate level that allows them to acquire the experience or training they need to develop their skills before a temporary or permanent return to their home country. However, this scenario does not reflect the experience of many, or probably most, international migrants (Schiff, 2005). As barriers to international migration increase, individuals often have to work below their skill level to reimburse the cost of migration. Even if they do return home, they may find that their skill sets have declined as a result of the time spent working below their capacity. Thus 'brain waste' is a further concern that relates to the match between the individual and the employment they take up abroad.

Recent EU policy initiatives reflect this more finely balanced understanding. The European Commission's 2011 Communication on Global Approach to Migration and Mobility (GAMM) and accompanying staff working paper on migration and development display a more flexible understanding of these issues than was evident in the 2005 Communication on Migration and Development (European Commission, 2005). Earlier approaches tended to favour a one-size-fits-all approach and to reinforce certain generalised assumptions, whereas one of the key insights of recent empirical work in this field is that context matters (Collyer, 2011). Owing to contextual variables, what works in one country is not likely to be a universally correct approach and variations may be considerable. One of the strengths of the mobility partnership approach is that it provides a framework for this variability – mobility partnerships are 'tailored to the specifics of each relevant third country, to the ambitions of the country concerned and of the EU' (European Commission, 2007, p. 3).

This emphasis on the key role of the non-EU state is central to the objectives of mobility partnerships and reflected in the symbolic change of name. When they were first discussed in 2006, they were called 'Mobility Packages'.

Mobility partnerships are ambitious in their scope, aiming to contribute to each of the three main areas of policy development set out in the main EU policy framework, GAMM. This approach involves a 'new compromise' between various agendas (Cassarino, 2009). Since it relies on initiatives by Member States within this broad framework, the practical policy content of mobility partnerships has been criticised as fragmented (Parkes, 2009). Furthermore, the relative lack of new opportunities for legal migration is thought to reflect Member States' reticence in this area (Reslow, 2012).

Nevertheless, based on the text of the four mobility partnerships that have been agreed – with Moldova (2008)[1], Georgia (2009)[2], Armenia (2011)[3] and Morocco (2013) – and the migration dialogues launched with Tunisia, Azerbaijan and Jordan, a relatively clear pattern of commonalities is discernible. This important and continually developing policy tool is based on a limited number of key assumptions (European Commission, 2009): the desire to develop a basis for cooperation beyond a focus on the control of undocumented migration, chiefly in relation to the significant role of circular migration; a recognition that previous EU approaches have been seen as one-sided in their direction; a willingness to extend greater control to partner countries; and a recognition that a rigid, one-size-fits-all approach would not work and flexibility was required politically, but also in relation to the complexity of the migration and mobility issues involved.

The EU's recent approach to this field recognises the variability within the area, as exemplified by the European Commission's communications cited above in 2007, 2009 and 2011. Given this, the ETF is interested in discovering the conditions under which the benefits of migration are increased for all parties. In particular, it wishes to focus on the development impact of migration, matching skills with jobs to facilitate legal mobility and skill development policies in relation to migration trends. By analysing the above-mentioned EU policy documents and the texts of mobility partnership agreements, seven key questions were identified concerning the relationship between migration and human capital that underlie the current EU approach. This study analyses the migration survey data from Armenia, Georgia and Morocco to discuss these issues.

QUESTION 1: DOES SEASONAL, TEMPORARY OR CIRCULAR MIGRATION BRING MORE BENEFITS TO MIGRANTS?

As a key assumption in the entire brain gain thesis, the potentially substantial benefits of migration can accrue to migrants who spend relatively short periods of time outside their home country or can be developed cumulatively by those who return on a regular basis, in a circular migration pattern (Abella, 2006). There is a degree of conceptual confusion about the three terms cited in the question. A recent study by the European Migration Network highlights that no EU Member State has a formal or legal definition of temporary migration (EMN, 2011).

In the absence of clear, widely accepted definitions, it is important to identify how these terms will be used. Seasonal migration typically refers to labour migration that is specific to increased demand during particular months of the year. It frequently involves agricultural labour but may also reflect seasonal peaks in demand in other sectors, such as hospitality, tourism and construction. Temporary migration refers to all other forms of movement that are not permanent, i.e. migration which occurs for a definite and limited period of time. Precise time periods vary widely. According to the standard United Nations (UN) definition, temporary migration involves a migration period of less than one year, beyond which migration is considered permanent. However, there are many examples where migrants are granted authorisation to remain in a destination country for more than one year. The authorisations granted are still strictly limited and would thus fit common understandings of 'temporary' migration. The particular time period in question must therefore remain flexible. Finally, circular migration is a series of two or more temporary migrations performed by the same individual.

A final difficulty concerns the de facto links between temporary and permanent migration. A key characteristic of the European temporary or 'guest' worker schemes of the 1960s was that many 'temporary' migrants stayed permanently. In such cases, migration may be initially temporary and become permanent. Some argue that temporary migrants should gradually accrue rights to more permanent residence; others insist that to be successful, temporary migration programmes must strictly police the temporary nature of the movement. Martin Ruhs' useful clarification that 'residence and employment on the basis of a temporary work permit *alone* does not create an entitlement to stay permanently in the host country' (Ruhs, 2005, p. 2) establishes a way of separating these issues, allowing the possibility that temporary migrants may gain permanent residence through other channels.

Another question that is relevant to the issue of circular or temporary migration is whether the portability of pension rights encourages circularity and increases the benefits of migration. Allowing migrants to claim social rights accrued in their country of destination upon return to their country of origin requires substantial levels of cooperation between the two countries. Cooperation is only likely to occur if both countries perceive advantages in

1   European Council, Joint Declaration on a Mobility Partnership between the European Union and the Republic of Moldova, 21 May 2008, 9460/08 ADD1.

2   European Council, Joint Declaration on a Mobility Partnership between the European Union and Georgia, 2979th Justice and Home Affairs Council Meeting, 30 November 2009.

3   European Council, Joint Declaration on a Mobility Partnership between the European Union and Armenia, 3121st Justice and Home Affairs Council Meeting, 27 and 28 October 2011.

the arrangement. Much of the attention in this area has been devoted to the form that such bilateral agreements take (Avato et al., 2009). It is assumed that migrants themselves will see an advantage in such a system, but this is likely to depend on the form such systems take.

Recent analysis of such portability has defined it as 'the ability to preserve, maintain and transfer vested social security rights or rights in the process of being vested, independent of profession, nationality and country of residency' (Holzmann and Koettl, 2011, p. 50). This implies that both state and private benefits should be redeemable after return. There is considerable inequality in the ways that social protection can be transferred. Poorer countries often lack the administrative structure to allow transnational benefits to be easily claimed (Sabates-Wheeler and Koettl, 2010). Better understanding of migrants' awareness of systems of transnational social protection would help governments decide if this should be a policy priority.

QUESTION 2: DOES THE EDUCATION LEVEL INCREASE THE BENEFITS OF THE MIGRATION EXPERIENCE?

The relationship between migration and education is potentially very complex and a variety of scenarios are discussed in the literature (Dustman and Glitz, 2011). As an organisation that promotes education and training, the ETF is particularly interested in testing if formal education increases the benefits of migration, meaning that those who are more educated are more likely to experience migration and/or return as successful. Beyond this fundamental issue, migration and education may be related in three other ways that are relevant to this research. However, this analysis will be able to discuss only some of them.

First, the relationship between a person's level of (formal) education and their decision to migrate is highly variable and will depend on labour market dynamics in both home and host contexts. In some cases, migration will be more attractive to low-skilled individuals and there will be sufficient legal opportunities to allow this. In other cases, highly educated individuals will be over-represented among emigrants due to the nature of demand and the structure of policy controls in particular destinations. This relationship will not be tested directly in this research since a representative sample of the education profile of the total emigrant population would be required in order to allow comparison with the education profile of the population as a whole. This relationship is nonetheless relevant to consider, particularly as it influences the second relationship.

Second, the relationship between levels of education and the nature of the work that migrants perform abroad is significant in evaluating brain waste. In some cases, highly skilled migrants from particular countries may face substantial entry barriers to professions, requiring complex recertification procedures. In contrast, work opportunities abroad suited for individuals with lower levels of education may be plentiful and easy to come by. If low-skilled jobs offer relatively high rewards, there may be incentives for more educated individuals to take up jobs that do not match their education levels. If there is no opportunity for promotion or advancement abroad, highly educated migrants may begin to lose the relevant skills that they developed during their formal education. This means that when they return they will no longer be properly qualified to perform the occupation they were trained for before leaving. Substantial periods of unemployment while abroad are likely to have a similar impact. The image of immigrant doctors working as taxi drivers in the USA has received some support in research on this topic (Mattoo et al., 2005) and is an obvious source of concern when evaluating the link between migration and education. In order to investigate this relationship, this research sets out to test the hypothesis that levels of education are generally commensurate with employment undertaken overseas.

Third, migration may have an impact on education levels even for non-migrants. This may happen in two ways: through the provision of incentives or the supply of resources. The incentivisation of education results from a situation where emigration is perceived as attractive and higher levels of education are seen as a route to emigration. This may have a positive impact on overall education levels, even for those individuals who do not end up migrating. However, it may also have an overall detrimental impact on the education system as a whole, as has been suggested in the case of nurse training systems in the Philippines (Masselink and Lee, 2010). In terms of the supply of resources, migration may provide resources, through financial remittances, boosting the overall human capital of communities, including those who have no direct connection with migration. This effect has been observed in Haiti (Georges, 2010) and Nicaragua (Osorio, 2010). Neither of these effects can be systematically tested in this research but the analysis will be attentive to the results to see if such effects are observed.

QUESTION 3: DOES MIGRATION LEAD TO ANY BRAIN GAIN?

This question prompts the first discussion on the benefits of temporary and circular forms of migration. Such migration has the potential to enhance the overall human capital stock in migrants' country of origin. In order for migrants' experience to be of positive benefit to their country of origin, three things must happen. First, they must develop their human capital during their period of time abroad, either by supplementing their informal skills with official or on-the-job training or by continuing the formal education process. Second, the migrants must return. This is assumed in the case of temporary migrants. Third, the experience gained abroad must be perceived to be of some

benefit to them on return. This may involve intangible benefits, such as a broader appreciation of the world, the capacity to emphasise with people of other cultures or a general openness to novelty and change. Such things are difficult to measure though they may well be one of the greatest benefits of international migration. Of necessity, this study focuses on more tangible benefits, such as whether experience or skills gained abroad are visible and instrumental in gaining a job on return.

Evidence from the literature is highly variable on this point. Nevertheless, an impression of the kind of factors which are significant in determining positive or negative outcomes is emerging. The most positive findings come from research with international student migrants. Baláž and Williams (2004) report tremendously positive results arising from research conducted with Slovakian students following a period of study in the UK. Even relatively short stays provided them with a significant advantage in the domestic labour market and resulted in substantial improvements in working conditions, status and salary on return. In contrast, in an economic model of the impact of temporary migration on language learning, Dustman (1999) finds that migrants staying for shorter periods of time are less likely to make an effort to learn the language of the country in which they are living. In such cases, it seems that by its very temporariness, migration actually discourages human capital development.

All these issues obviously need to be carefully contextualised. The significance of migration will be judged on return as much by the symbolic value of the experience and the qualifications obtained as by their practical value. There are some exceptions to this, where benefits are tangible and retain a value on return. Baláž and Williams discuss the significance of education in an English-speaking environment for the employment prospects of Slovakian students on return. The value of a global language is that it retains a degree of currency on return. Dustman does not incorporate such considerations into his model and that may affect the willingness to develop human capital. The impact of non-formal training has not been widely analysed in the literature on these topics. However, following research into formal education, we could hypothesise that it will have greater value when it is reinforced with some kind of recognised qualification.

QUESTION 4: DOES WORK EXPERIENCE ABROAD IMPROVE THE LABOUR MARKET CHANCES OF RETURNEES AT HOME?

This issue builds on the previous one by investigating how migrants' experiences abroad are valued on return. It may be that migrants are chiefly valued for their economic capital, a finding that would undermine the value of circular migration as a positive development tool. Even if migration brings certain economic benefits for individual migrants it may be the case that such benefits can only be sustained by repeated migration. For circular migration to be an effective and sustainable strategy, the migration experience must be valued in the labour market of the country of origin, enabling migrants to stop migrating when they wish.

The limited empirical evidence on this question suggests that this is the case. In a particularly influential study on return migration to Egypt, McCormick and Wahba (2001) use the period of time overseas as a proxy for skill development. They find that both financial resources and period of time spent abroad are positively related to the development of entrepreneurial activities after return. However, even in the absence of financial resources, migrants who had spent a longer time abroad were more likely to develop self-employed business activities on return. They offer the powerful conclusion that the failure to develop the entrepreneurial sector in countries like Egypt has more to do with limits on human capital than with capital market imperfections. This is a key finding to test in other contexts and will form the basis for the hypothesis to be tested here.

QUESTION 5: DOES MIGRATION IMPROVE THE SOCIO-ECONOMIC CONDITIONS OF MIGRANT HOUSEHOLDS IN A SUSTAINABLE MANNER?

The classic 'triple win' scenario is largely responsible for the renewed optimism about the positive impact of migration on development. Over the last decade, high-level international meetings such as the Global Forum on Migration and Development have done much to advance research and policy in this area. There is now widespread consensus that migration provides resources to the country of origin. According to the World Bank, financial transfers from migrants exceeded USD 350 billion (EUR 275 billion) at a global level in 2011. Most of that money is transferred from richer to poorer countries. As that figure represents only officially recorded flows, total financial transfers are likely to be much larger.

Such aggregate data has driven the interest in the relationship between migration and development, though policy initiatives now target approaches beyond the simply economic (Collyer, 2011). Nevertheless, attention remains focused on remittances. This is because the relevant data is now widely collected and it is usually clear that migration has a positive economic impact on countries of origin at national level. Critics of the development impact of migration typically focus on the unequal distribution of the costs and benefits of migration. Despite the vast sums of money associated with migrants' remittances, the bulk of these transfers are made by individual migrants making tremendous sacrifices to help support their families. These migrants pay substantial costs, in terms of their social and family life, in return for relatively marginal economic gains.

Since it is clear that financial remittances form an essential component of the economies of Armenia, Georgia and Morocco, the discussion will therefore focus on the socio-economic benefits of migration to individuals and families and their longer-term sustainability. In economic terms, this relates not just to the amounts of remittances received, their regularity and significance in household budgets, but also the longer-term impact of migration resulting from the improvement in the social and economic conditions of their households.

QUESTION 6: CAN MIGRANT SUPPORT MEASURES BEFORE DEPARTURE AND AFTER RETURN LEAD TO MORE SUCCESSFUL MIGRATION OUTCOMES?

Capturing the full benefits of migration may require state support in certain cases. There are plenty of examples of reintegration assistance for returnees around the world. Academic interest and analysis dates back to the Dutch REMPLOD (Reintegration of Emigrant Manpower and Promotion of Local Development) initiative of the 1970s (Entzinger, 1985). In most cases, such reintegration programmes, whose components vary from direct advice and support to financial schemes such as the provision of low-interest loans to support development projects, are limited in their uptake.

Pre-departure training has always been a key element of organised labour migration schemes, dating back to agreements signed between Northern European countries and North African states in the early 1960s (Collyer, 2004). At that time, training was often organised by branches of government in the states of destination. However, as the organisation of labour migration moves from a state to a private responsibility in destination countries, it is increasingly common for pre-departure training to be provided by the government of the country of origin. This is typically the case in major exporters of labour such as Sri Lanka, Bangladesh or the Philippines, where formal pre-departure training may involve practical skills related to the prospective employment. This can cover areas such as the operation of domestic appliances for trainee housemaids in Sri Lanka, or more general skills, such as financial management, which is a key element of pre-departure training in the Philippines (McKenzie, 2012).

Data on the precise impact of schemes offering either pre-departure training or post-return reintegration is still extremely limited. It seems reasonable to hypothesise that in either case, state support can potentially have a positive impact on the overall benefit of migration to the country of origin, but it is not yet clear which components of such support are the most valuable.

There is substantial and growing interest in all six of these questions, and all of them relate to the operation of the EU mobility partnerships. Yet the evidence base for all these issues is inconclusive. At best, it is clear that there is substantial variability across countries. Therefore, the main aim of this study is to discuss these issues through the comparative analysis of migration data collected by the ETF in Armenia, Georgia and Morocco, and to understand how these crucial variables operate and interact, particularly in the context of the three countries surveyed.

3. SURVEY METHODOLOGY

The project involved two separate but related national surveys carried out in three countries: Armenia, Georgia and Morocco. The first targeted potential migrants and the second focused on returned migrants. The sampling technique used in the potential migrant survey was designed to obtain a nationally representative sample, reflecting the key characteristics of the national population as a whole. An additional snowball method was employed in the case of the return migrant survey. All interviews were conducted in the three sending countries rather than in migrant destinations because the inclusion of other sites would have dramatically increased the cost and complexity of the field work. As a result, the returned migrant survey was not a sample of all emigrants but inevitably skewed towards those present in their home country at the time the survey was done[4]. Both surveys were based on detailed individual questionnaires designed to explore the relationship between migration, education, skills and employment.

The first survey targeted potential migrants, who were defined as citizens between the ages of 18 and 50 and were present in the country of origin at the time of the survey. A stratified cluster random sample based on predefined frames was obtained to ensure broad geographic representation. Furthermore, potential migrants' households were randomly selected and only one potential migrant in each household could have been interviewed. In Armenia, the national electricity supply company's database of addresses was used as it had been updated in December 2011 and provided more accurate data than the national census (ETF, 2013a). In Georgia, the 2002 census data was used to obtain the nationally representative sample (ETF, 2013b). In both countries, only one individual was randomly selected from each household in the sample to complete the potential migrant questionnaire.

In Morocco, sampling was more complicated given the much larger territory and greater population to be covered. A slightly different approach was taken. Since there was no comparable, recently updated sampling frame of all addresses in the country, a sampling frame had to be constructed. This was done on the basis of a detailed longitudinal panel derived from the 2004 national census that had been updated as recently as 2010. Sampling took place in three stages. At the last stage, gender quotas were included to ensure comparable representation of men and women (ETF, 2013c).

The second survey targeted returned migrants. This population was defined as anyone who left the country aged 18 or over, had at least three months' experience of living and working continuously abroad and returned no more than 10 years previously. Given the specificity of this population, a mere random sample was not enough to find all returnees. An additional snowball sampling method was therefore used in the same geographical areas to complement the initial, nationally representative survey. If a return migrant was present in houses selected for the potential migrant survey, a maximum of one returnee per household was interviewed using the return migrant questionnaire. Households were asked about the presence of further returnees in the same neighbourhood and the sample developed in a snowball fashion. In rare cases where an individual was *both* a potential migrant *and* a returnee, the return questionnaire was used but the answers were counted for both potential and returned migrant datasets.

These were large surveys involving a total of 12 000 respondents. In each country, the target sample was 2 600 interviews for the potential migrant survey and 1 400 interviews for the returned migrant survey. In Armenia, the survey involved 10 supervisors and 74 interviewers, and was conducted in December 2011 and January 2012. In Georgia, the survey was conducted in October and December 2011. In Morocco, it was conducted between May and July 2012. In Armenia and Georgia, the potential migrant data was weighted by gender and region to ensure national representativity. In the case of Morocco, the reliance on a sampling frame that was already nationally representative, combined with quota sampling on the basis of gender meant that weighting was not applied.

In addition to the surveys, substantial background research was undertaken by local teams in Armenia, Georgia and Morocco. Desk research took the form of a comprehensive survey of existing statistical data, legislation and bilateral agreements relating to migration in the three countries. This was supplemented by expert interviews with government officials and representatives of relevant non-governmental organisations. The background material is presented in detail in three separate country reports (ETF, 2013a; 2013b; and 2013c) as well as a cross-country report of Armenia and Georgia (ETF, 2013d). This report focuses on the international comparison of the results of the survey data from the three countries.

The survey data was analysed using the SPSS statistics software package. The country reports present a detailed picture of the situation in each country based on the analyses produced by local teams with support from the ETF. As the main SPSS datasets include more than 250 variables for each survey, the presentation of data has necessarily

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4 Detailed information on sampling in each country can be found in the following country reports: ETF, 2013a; 2013b; and 2013c.

been selective, even in the detailed reports. This comparative report presents a descriptive analysis of the results by key variables across three countries in Chapter 4 and then moves on to discuss key questions in Chapter 5. The analysis required the construction of several key composite indicators, involving a selection and weighting of sets of first-level variables in the survey. In total, five composite indicators were developed for this analysis.

1. The propensity to migrate indicator was constructed using seven discrete variables from the potential migrant questionnaire: the likelihood of migration within six months; the likelihood of migration within two years; the ability to finance the move; the ability to speak the language of the most likely destination; the subjective assessment of whether the respondent possesses information about the most likely destination; possession of at least four of the six documents necessary for migration (passport, visa, work contract, work or residence permit, acceptance letter for study or training); and a subjective assessment that the respondent would have no difficulty in obtaining the remaining documents. Prospective migrants had to score at least 6 out of a maximum score of 11.5 on the propensity indicator in order to be considered ready to migrate.

2. The social conditions indicator aggregates information about living conditions and basic household possessions obtained from a set of questions that was included in both the potential migrant and returned migrant questionnaires. It takes into account the number of people living in the household, the number of rooms in the house and the presence of a series of indicative facilities or items. Such facilities or items included piped drinking water, hot water, indoor flush toilet, modern heating/electricity system, colour TV, washing machine, computer, internet connection and car[5]. The resulting indicator has a minimum value of 0 (the worst living conditions) and a maximum value of 2 (the best living conditions). The following thresholds were used for three classifications: (i) worse living conditions (0.0 to 0.74); (ii) average living conditions (0.75 to 1.34); and (iii) better living conditions (1.35 to 2.0).

3. The economic conditions indicator was also calculated for both questionnaires. It takes into account house and land ownership, overall household income from all sources (equalised monetary income) and the receipt of any remittances. The resulting indicator has a minimum value of 0 (the worst economic situation) and a maximum value of 4 (the best economic situation). The following thresholds were used for three classifications: (i) worse living conditions (0.0 to 1.3); (ii) average living conditions (1.4 to 2.6); and (iii) better living conditions (2.7 to 4.0).

4. The migration outcome indicator brings together nine variables relating to the period of time spent abroad and aggregates different dimensions of a returnee's legal and work status abroad. The variables include: career progression abroad; the fit between skill levels and the type of work abroad; work or residence permit; fair treatment at work and any negative experiences (such as discrimination); the recognition of educational qualifications; skill development opportunities; periods of unemployment; remittances sent home; and legal status while abroad. Based on the scores, migration outcomes were classified as follows: (i) highly successful (total score 9 to 15); (ii) successful migration (total score 4 to 8.5); (iii) neither successful nor unsuccessful (total score 1 to 3.5); (iv) unsuccessful (total score -2 to 0.5); and (v) extremely unsuccessful (total score less than -2).

5. The return outcome indicator focuses only on the migrants' experience after their return, assessing the impact of labour migration on different dimensions of post-return work and current economic status. It combines six variables from the returned migrant questionnaire: the savings brought back home; employment upon return; post-return opportunities for career progression; social benefits linked to migration; usefulness of migration in finding a job at home; and returnee's subjective assessment of the benefits of migration. Based on the total scores obtained, return outcomes were classified as: (i) highly successful (total score 9 to 12); (ii) successful (total score 4 to 8.5); (iii) neither successful nor unsuccessful (total score 1 to 3.5); (iv) unsuccessful (total score -1 to 0.5); and (v) extremely unsuccessful (total score less than -1)[6].

These five compound variables are considered as single variables but are also broken down into their constituent parts. A wide range of other significant factors are also taken into consideration in the analysis that follows. The indicators result in a single figure, but the data is made meaningful by dividing it into groups and labelling each one. The social and economic indicators are labelled 'worse', 'average' and 'better'. The migration and return indicators are labelled 'successful', 'no difference' and 'unsuccessful'. In the case of the economic and social conditions indicators, boundaries were chosen to create three more or less equal groups in total.

As a baseline picture for readers, **TABLE 3.1** below gives a descriptive overview of the survey samples on the most important variables. Key features to note are: the low share of women workers among returnees in Armenia and Morocco; a generally higher mean age of returnees compared to the mean age of potential migrants; and much lower education levels in Morocco compared to those in Armenia and Georgia. The education levels of the potential migrants' sample are fully consistent with the general education levels of the populations in all three countries.

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5 In Morocco, the presence of two other items was added – having a fridge and air-conditioning.

6 Thresholds used for Morocco due to some differences in the variables considered: (i) highly successful (total score 8 to 10); (ii) successful (total score 5 to 7.5); (iii) neither successful nor unsuccessful (total score 3 to 4.5); (iv) unsuccessful (total score 0 to 2.5); and (v) extremely unsuccessful (total score less than 0).

TABLE 3.1 OVERVIEW OF THE SURVEY SAMPLES: POTENTIAL MIGRANTS AND RETURNED MIGRANTS

Sample description		Armenia		Georgia		Morocco	
		potential	returnees	potential	returnees	potential	returnees
Sample size		2 630	1 395	2 883	1 401	2 604	1 400
% of women		64	13	61	41	49	19
Mean age		34	37	35	41	34	42
Location: capital (%)		38	38	26	21	20	39
Other urban (%)		31	30	27	22	41	44
Rural (%)		31	33	47	57	39	18
Education level before migration (%)	Low	6	12	13	2	83	59
	Medium	62	65	55	69	10	26
	High	32	23	32	29	7	15
% of those working		39	44	29	30	52	68

Note: Data is not weighted in this table, but all other data regarding potential migrants presented in the graphs and tables in the following chapters is weighted to ensure national representativity; less than 2% of the data is missing. Education levels are classified as low (ISCED[7] 1-2), medium (ISCED 3-4) and high (ISCED 5-6).

The education levels of Moroccan potential migrants are particularly low, reflecting the low education level of the population, while the education levels of returnees are higher. Compared to the same group in Armenia and Georgia, the share of potential migrants with a low education level is high (83%) and the share of highly educated potential migrants is low (7%) – compared to one-third in the other two countries. Finally, the share of people who are employed at the time of the survey is low in all countries, albeit with variations, suggesting the diversity of the countries and the different starting positions of the migrants and their profiles. Nonetheless, returnees are more likely to be employed in all countries compared to the potential migrants' sample.

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[7] International Standard Classification of Education developed by UNESCO to facilitate comparisons of education statistics and indicators across countries on the basis of uniform and internationally agreed definitions.

4. CHARACTERISTICS OF MIGRANTS IN ARMENIA, GEORGIA AND MOROCCO

This chapter presents a descriptive analysis of comparative results on the most important variables of the surveys in a cross-tabulated form. A detailed discussion of the survey results for each country can be found in country migration reports for Armenia (ETF, 2013a), Georgia (ETF, 2013b) and Morocco (ETF, 2013c). The key comparisons to be discussed are between Armenia, Georgia and Morocco, and between the three groups of migrants that emerge from the two surveys in each country: non-migrants, potential migrants and returnees. Data on both non-migrants and potential migrants comes from the potential migrant survey. The distinction between the two is their answer to the question 'are you seriously thinking of moving abroad?' Those who answer 'yes' are potential migrants, those who report that they are not thinking of moving abroad are non-migrants. Returnees are all of those who respond to the return migrant questionnaire. All data is presented in associated tables and graphs[8].

It must be emphasised that the analysis here is mainly of a descriptive nature. It is the first step in presenting the data before any inferential statistics, which could shed a better light on possible relationships among the variables of our interest, are used. This is because the paper aims to first give a general overview of key variables identified on the link between skills, employment and migration in the countries of origin. Last but not least, the sample of potential migrants is fully representative of the 18 to 50 age group in the countries, while the sample of returnees has limited representativeness. The latter could capture only those who actually 'returned' to the country, thus excluding migrants (and diaspora) currently living abroad. To be fully representative, similar surveys in destination countries would have been necessary.

4.1 INTENTION TO MIGRATE AND MAIN PUSH FACTORS

The share of the potential migrant sample who declared their intention to move abroad was 36% in Armenia, 31% in Georgia and 42% in Morocco (**GRAPH 4.1**). This means that large majorities of people aged between 18 and 50 in these countries do not intend to migrate: 64% in Armenia, 69% in Georgia and 58% in Morocco.

To test the seriousness of their intention, a propensity to migrate indicator was constructed using seven variables: the likelihood of migration within six months; the likelihood of migration within two years; the ability to finance the move; the ability to speak the language of the most likely destination; the subjective assessment of whether the respondent possesses information about the destination; possession of at least four of the six documents necessary for migration (passport, visa, work contract, work or residence permit, acceptance letter for study or training); and a subjective assessment that the respondent would have no difficulty in obtaining the remaining documents. According to the index, only 9% of Moroccans were able and ready to leave, followed by 11% of Georgians and 13% of Armenians. The difference between migration intention and real ability is the highest in Morocco, reflecting the attractiveness of migration as an idea but also the limited access to legal migration.

The survey took into consideration three types of location in each country: rural, urban and the capital (or both Rabat and Casablanca in the case of Morocco). While the intention to migrate is as strong in rural and urban areas, the data on the distribution of survey respondents in Morocco highlights significantly different regional patterns. The regions with the highest proportions of potential migrants are mostly associated with traditional areas of emigration. This is the case for Agadir, in the south, where 52% of respondents declared a serious intention to move abroad. The Souss, the relatively arid area inland from Agadir, is the best-established area of out-migration in the whole country. A second important area of traditional out-migration is Oujda, close to the Algerian border, with 45% potential migrants. The other two regions with high proportions of potential migrants are Meknes (50%) and Marrakech (49%). Although neither area is strongly associated with traditional patterns of migration, both are adjacent to significant areas of more recent out-migration. The areas with limited inclination to emigrate are Rabat (26%) and the port city of Tangier and its immediate neighbourhood (33%), which are rapidly growing and dynamic locations that may generate the kind of optimism that keeps people attached.

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8   The results given in all tables and graphs refer to valid number of respondents (n) and their percentages (%), excluding missing responses ('no answer'/'refuse to answer'). Moreover, data on potential migrants in Armenia and Georgia is weighted by gender and settlement, unless specified as unweighted. Finally, the percentage of missing responses is reported under each table or figure and is calculated as based on the unweighted samples.

GRAPH 4.1 INTENTION AND LIKELIHOOD TO MIGRATE (%)

Intention to migrate ■   Likelihood to migrate ■
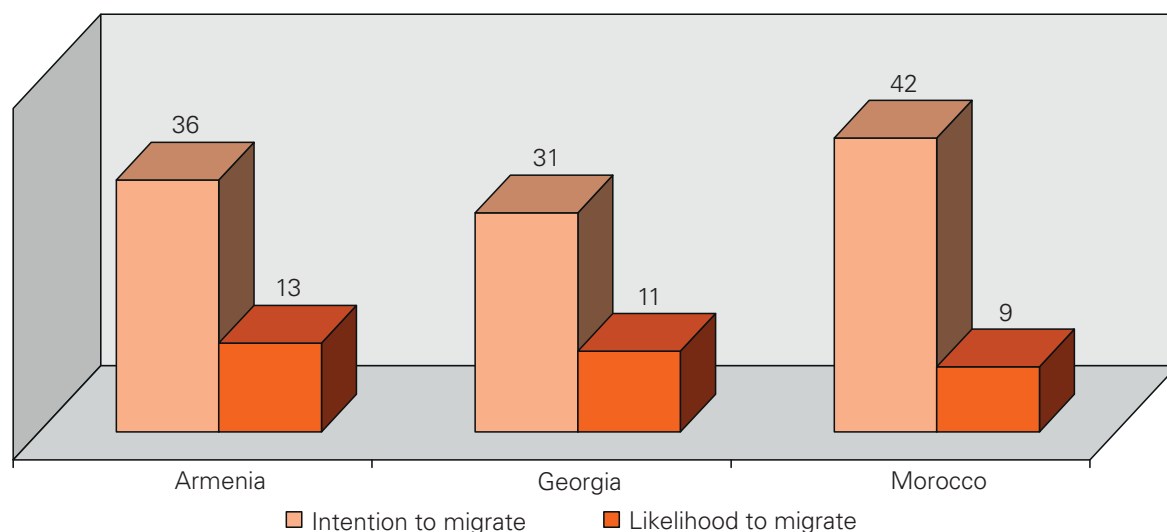
Note: Intention to migrate – missing data less than 1%; Likelihood to migrate – missing data equal to 11% (Armenia), 9% (Georgia) and 12% (Morocco).

In Armenia, the regional distribution is similarly varied. There is no area where the proportion of potential migrants reaches 50%, as in Morocco. However, it does vary from 21% in the southern province of Syunik to a high of 45%. The areas with the highest proportions of potential migrants are the three northern regions of Tavush (40%), Lori (41%) and Shirak (45%). These remote mountainous areas are the country's poorest regions, indicating a clear connection to rural poverty and a desire to emigrate. In Georgia, people living in urban areas (except the capital) were more likely to migrate, whereas people living in Tbilisi (the capital) were the least likely to migrate. Although possibilities for analysing the data collected at regional level were limited, the Kvemo Kartli region had the highest proportion of potential migrants, with more than 90% seriously thinking of going abroad. This region is populated largely by Azeris, the ethnic group that most frequently practises short-term seasonal labour migration. Another region with higher potential was Samegrelo-Zemo Svaneti (36%).

The main reason for migration is overwhelmingly economic, even more so in Armenia and Georgia (**GRAPH 4.2**).

GRAPH 4.2 MAIN PUSH FACTORS FOR EMIGRATION: POTENTIAL MIGRANTS AND RETURNEES (%)
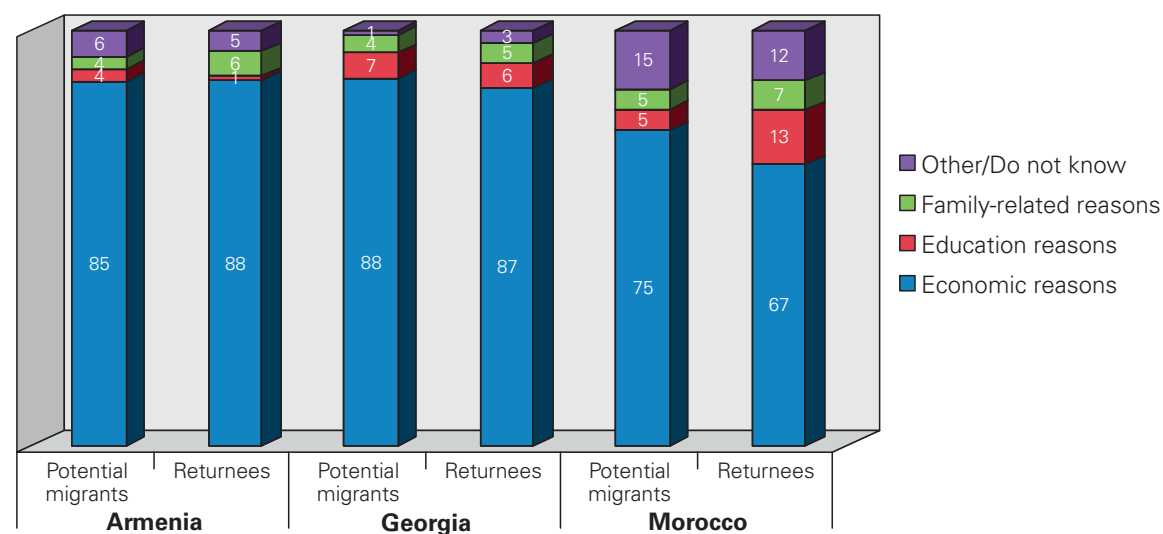
■ Other/Do not know
■ Family-related reasons
■ Education reasons
■ Economic reasons

Note: Data for potential migrants refers only to those who intend to migrate (n=892 in Armenia, n=852 in Georgia and n=1 086 in Morocco); missing data less than 5% except for the group of potential migrants in Morocco (6%).

Taken together, the factors of having no job, unsatisfactory wage and career prospects and the need to improve living standards explain 75% of the migration intention of potential migrants in Morocco, although it was slightly less important in the case of returnees (two-thirds). However, 'education' as a reason for migration is relatively sizeable in Morocco, reaching 13% among returnees, and 7% among potential migrants in Georgia. This is a positive finding, as in such cases individuals are using migration to increase their own human capital. Moreover, the return of educated migrants can potentially lead to the enhancement of the level of human capital in the countries of origin. In Morocco, the main reasons for leaving cited by a sizeable number of respondents were also linked to dissatisfaction with living in Morocco and a desire to live in other possible destinations (all included in the category 'Other' in the graph).

4.2 WHO ARE THE MOST LIKELY MIGRANTS?

While more men than women clearly want to emigrate abroad, the share of women among potential migrants is not that low (just above 40% in all countries) (**GRAPH 4.3**). However, the share of women among returnees was particularly low in Armenia (13%) and Morocco (19%), given the dominance of male migration from these countries. In Georgia, 41% of returnees were women, reflecting a 'feminisation' of migration. It must be emphasised that finding female respondents, particularly among returnees, was more difficult in Morocco. This was due to the cultural barriers to talking to women as well as the fact that far fewer female returnees actually worked abroad – they were more likely to have the status of 'family member', rather than being a 'migrant worker'.

GRAPH 4.3 INTENTION TO MIGRATE BY GENDER (%)
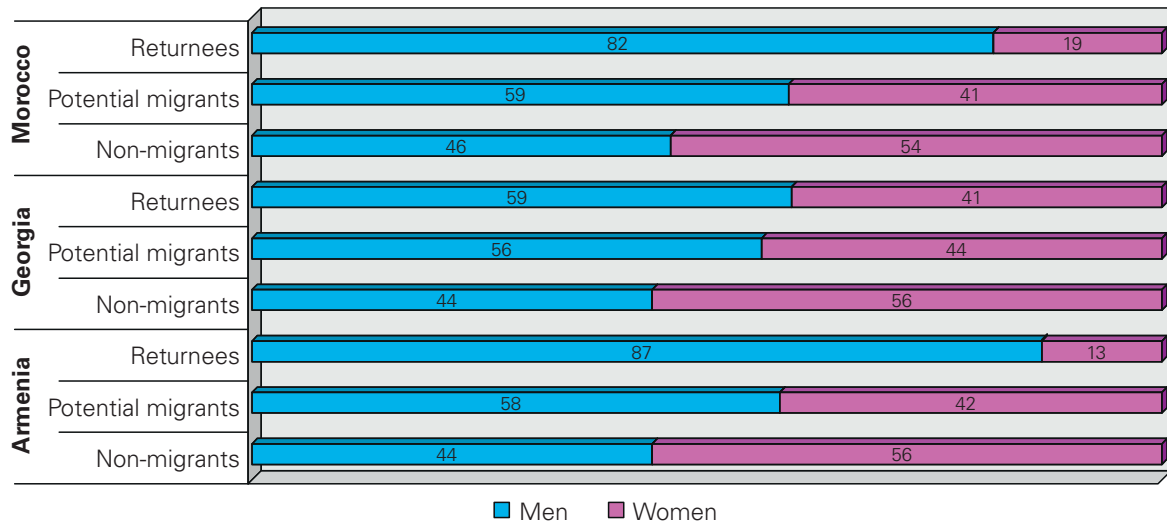
With regard to age groups, those aged 18 to 30 are clearly the most likely to migrate, as they have fewer family links at home (they are less likely to be married and less likely to have children) (**GRAPH 4.4**). There are fewer potential migrants in the 31 to 40 age group compared to non-migrants. A similar pattern can be seen in the 41 to 50 age group. However, the overall share of the 31 to 40 age group among potential migrants is higher in Armenia and Georgia. This reflects their mature demographic structure, which is older than the average age of potential migrants in Morocco. Returnees tend to be older (between 40 and 45 years old), more likely to be married and to have children at home.

Potential migrants are the least likely of the three groups to have been married: around 10% less likely than either non-migrants or returnees in the case of Armenia and Georgia (**TABLE 4.1**). Differences are most pronounced in Morocco where 57% of potential migrants are unmarried, compared to 32% of returnees and 28% of non-migrants. In Armenia, returnees are the most likely to have been married (73%), while in Georgia and Morocco, non-migrants are the most frequently married (around 70%). What is clear in all three countries is that these patterns of marriage reflect the relatively younger profile of potential migrants and support the fact that those with fewer family ties to their home country are more likely to express a desire to migrate abroad. It also suggests that married migrants who were not joined by their spouses are more likely to return.

GRAPH 4.4 INTENTION TO MIGRATE BY AGE GROUP (%)

	18-30	31-40	41-50
Morocco Non-migrants	34	29	37
Morocco Potential migrants	55	26	19
Georgia Non-migrants	34	32	34
Georgia Potential migrants	42	32	26
Armenia Non-migrants	45	23	32
Armenia Potential migrants	54	19	27

■ 18-30 ■ 31-40 ■ 41-50

Note: Missing data less than 1%.
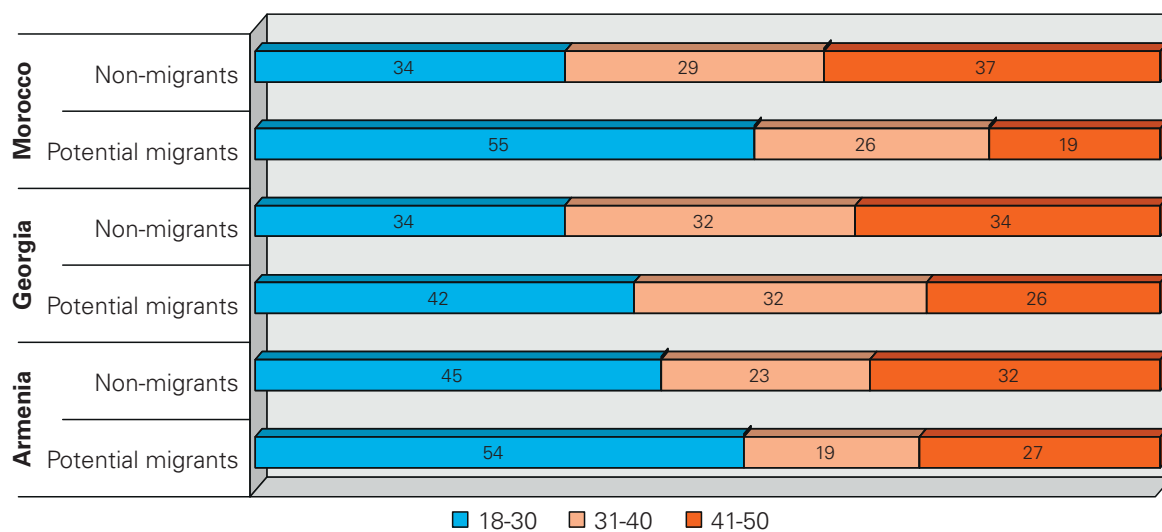
TABLE 4.1 INTENTION TO MIGRATE AND MARITAL STATUS (%)

	Never married	Married/ living together	Divorced/ separated	Widowed
Armenia				
Non-migrants	34	63	3	1
Potential migrants	41	56	2	1
Returnees	23	73	3	1
Georgia				
Non-migrants	24	70	4	2
Potential migrants	34	57	6	3
Returnees	21	65	9	5
Morocco				
Non-migrants	28	67	3	2
Potential migrants	57	40	3	1
Returnees	32	61	7	1

Note: Missing data less than 1%.

The thesis that family ties reduce an individual's desire to emigrate is further supported by data on children. Although substantial majorities of all three groups have children, clear differences are apparent. In Armenia and Georgia, returnees are the most likely group to have children, with almost three-quarters in both countries reporting that they have children. In Morocco, just over half of the returnees have children; again, non-migrants are the most likely to have children. In all three countries, potential migrants are by far the least likely to have children. Around 60% of potential migrants have children in Armenia and Georgia, but this is a lower proportion than in either of the other groups. In Morocco, only 36% of potential migrants have children, compared to 65% of non-migrants.

Comparing the education levels of non-migrants, potential migrants and returnees may identify the trends in the educational profile of migrants and give us some indications of any potential brain drain. Categorising migrant groups by education level highlights the overall high education levels in Armenia and Georgia, where schooling is virtually universal, and the low education levels in Morocco, where more than half of non-migrants have never attended school (**TABLE 4.2**). This distinction leads to a different relationship between education and migration. In Armenia, returnees are more likely to have completed lower secondary and upper secondary education (both general and vocational), suggesting that the secondary general and vocational educational paths are more likely to lead towards migration. Out of the three groups in Armenia, returnees appear to be the least-educated group and non-migrants the most educated group, with potential migrants somewhere between the two (closer to non-migrants).

TABLE 4.2 EDUCATION LEVELS (PRIOR TO MIGRATION) OF POTENTIAL MIGRANTS, NON-MIGRANTS AND RETURNEES (%)

Education level	Non-migrants (18-50 age group)	Potential migrants (18-50 age group)	Returnees (18+ age group)
Armenia			
No schooling	-	-	-
Primary or less	0	0	1
Lower secondary	6	9	12
Upper secondary general	40	39	42
Upper secondary vocational	6	5	9
Post-secondary vocational	18	17	14
Higher education	31	30	23
Georgia			
No schooling	-	-	-
Primary or less	1	0	-
Lower secondary	11	15	2
Upper secondary general	29	32	40
Upper secondary vocational	14	16	18
Post-secondary vocational	10	10	10
Higher education	35	27	29
Morocco			
No schooling	51	43	20
Primary or less	20	27	22
Lower secondary	12	14	17
Upper secondary general	6	9	18
Upper secondary vocational	2	2	4
Post-secondary vocational	1	1	4
Higher education	8	5	15

Note: Missing data less than 1%.

In Georgia, non-migrants are better educated, having a higher share of university graduates. Potential migrants appear to be the least-educated group, with higher shares of lower secondary and upper secondary education (both general and vocational paths). The share of those with vocational education (both upper secondary vocational and post-secondary vocational) is the highest among returnees and the lowest among non-migrants. This suggests that, in the two countries, highly educated people are more likely to succeed in the local economies and make use of their knowledge and skills at home than the sections of the population with a lower level of education. This is more prevalent in Georgia than Armenia and the intention of more highly educated individuals to migrate is relatively lower. Thus, the returns from education seem to be higher in the case of this group.

In Morocco, the picture is much more complicated. All groups have far lower levels of education than in Armenia or Georgia and non-migrants have the lowest level of education – 51% have had no formal education (and more than 30% are illiterate). The share of no schooling is 43% among potential migrants and 20% among returnees. Thus, the lack of education seems to contribute to a low desire for migration among the lowest-educated group. Out of the three groups in Morocco, returnees appear to be the most educated group, while non-migrants are the least-educated group. Potential migrants fall between the two but relatively fewer university graduates want to migrate. The fact that returnees are proportionally more represented at higher education and secondary general education level raises the question of a slight brain drain trend. However, this cannot be proven as the sample of returnees does not include all migrants abroad. Moreover, women represent a high share of non-migrants, who have a lower intention to migrate than men and have a lower level of education in the Moroccan context.

Analysis of the fields of education studied in VET and higher education in Armenia and Georgia reveals the traditional pattern of gender division (the number of Moroccans was too low to analyse). Much greater proportions of women than men studied education and teaching in both countries. More men tended to study engineering, manufacturing, construction and architecture.

Looking at the aggregated education categories, the feature common to Armenia and Georgia is that those with higher education have a lower intention to migrate (**GRAPH 4.5**). This is clear in Georgia, where 35% of non-migrants have completed higher education, compared to 29% of returnees and 27% of potential migrants. In Armenia, the share of university graduates among potential migrants and non-migrants is almost identical (30% and 31%, respectively), and is higher than in the case of returnees (23%). Given the high proportion of potential migrants in the youngest age group, it is possible that individuals who are currently studying are counted as less educated. In the case of the differences between potential migrants and returnees, there may also be a generational difference behind the lower levels of education of returnees in Armenia. Moreover, the majority of returnees in the sample were men, who tend to have a lower education level than women. Finally, given the nature of the sample of returnees, we may also assume that a share of highly educated individuals may have stayed in the destination countries if their migration experience was successful.

GRAPH 4.5 INTENTION TO MIGRATE BY EDUCATION LEVEL PRIOR TO MIGRATION (%)
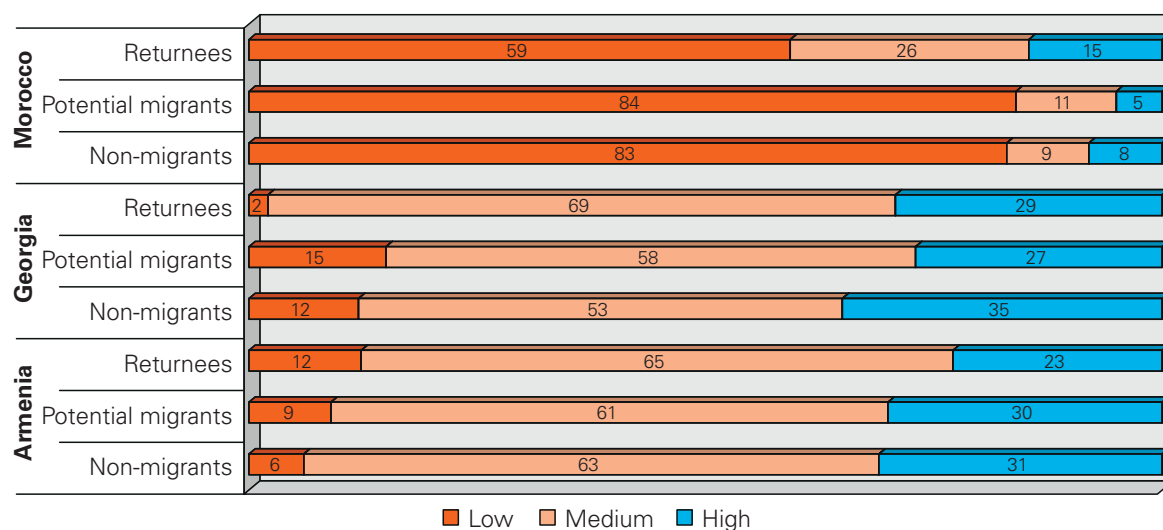
Note: Education levels are classified as low (ISCED 1-2), medium (ISCED 3-4) and high (ISCED 5-6); missing data less than 1%.

In contrast to Armenia and Georgia, returnees in Morocco are the best-educated group: 15% of returnees have a high level of education, compared to 8% among non-migrants and 5% among potential migrants. A comparison of the education levels of returnees before and after migration reveals that while the education levels of migrants improved slightly during migration, they were still the most educated group even before migration. This may mean that migration in the past has been quite self-selective towards better-educated individuals or a higher number of better-educated migrants actually returned to Morocco so that our survey could include them. Notwithstanding the limitations of sampling, education has been a relatively significant factor in migration and the majority of returnees in the sample were men, who tend to be better educated than women in Morocco. Finally, there is a difference between the intention to migrate and readiness to migrate. In general, the most educated were most ready to leave in Morocco, suggesting that this is the group with the means to move abroad.

Looking at the migration intention at each education level separately (**GRAPH 4.6**), the share of potential migrants is highest among those with a low level of education in Armenia (46%) and in Georgia (36%). In Morocco, the share of potential migrants is highest among those with a medium level of education (47%). This is mainly due to the differences between the low education level of the Moroccan population and the generally higher education levels in Armenia and Georgia. In reality, individuals with primary and secondary education are the most likely potential migrants in all countries, but this group forms the 'lowest-educated' category in Armenia and Georgia, while they are in the 'medium-educated' category in Morocco due to the sizeable share of people who are illiterate or who have had no schooling. Indeed, migration seems unlikely where there are very low levels (or a complete lack) of education, suggesting an 'education hump' (similar to the famous 'migration hump' identified by Phillip Martin).

Comparing education levels of women and intention to migrate indicates the opposite pattern in Armenia and Georgia: female potential migrants are significantly better educated than men. In Georgia, 32% of them have university degrees compared to 23% of male potential migrants. In Armenia, 33% of them have university degrees compared to 29% of male potential migrants. Also, post-secondary vocational education is more common among female potential migrants. Thus, women provide the examples where potential migrants are better educated than non-migrants in the two countries.

GRAPH 4.6 SHARE OF THOSE INTENDING TO MIGRATE BY EDUCATION LEVEL PRIOR TO MIGRATION (%)

	Armenia			Georgia			Morocco		
	Low	Medium	High	Low	Medium	High	Low	Medium	High
Non-migrants	54	65	65	64	67	74	58	53	66
Potential migrants	46	35	35	36	33	26	42	47	34

Note: Missing data less than 1%.
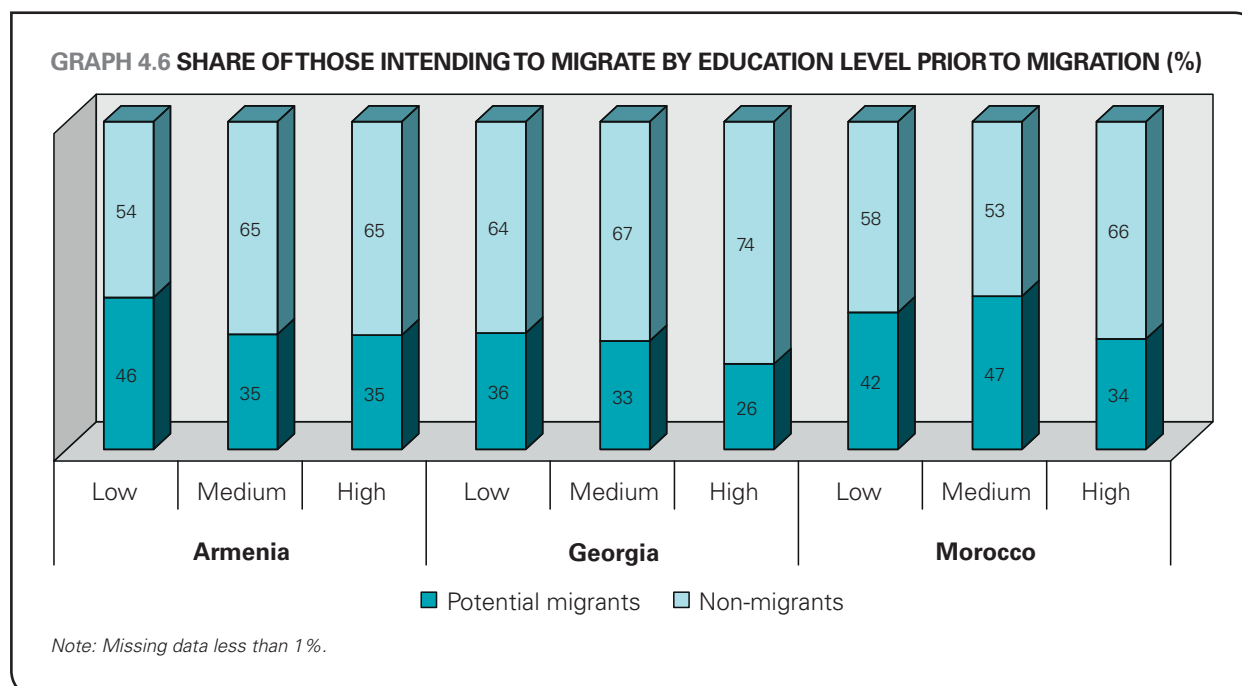
It is important to highlight that despite the differences among the three groups (non-migrants, potential migrants and returnees), the education and skill levels of migrants largely reflect the overall education levels of the populations and the structure and performance of education systems in the countries. For example, migrants from Armenia and Georgia are more likely to have reached a medium and higher education level and migrants from Morocco are less likely to have higher education. Moreover, the share of people with vocational education (both upper secondary vocational and post-secondary vocational) is quite considerable in Armenia (between 22% and 24% across the three groups) and Georgia (between 24% and 28% across the three groups). This reflects the larger size of VET in these countries. In contrast to Armenia and Georgia, vocational education is very rare in Morocco (between 3% and 8% across the three groups), with only a small number completing upper secondary vocational and/or post-secondary vocational education, which reflects the actual structure of its education system.

4.3 INTENTION TO MIGRATE AND WORKING STATUS

The employment level is low in all three countries, albeit with variations (**GRAPH 4.7**). On average, only one-third of respondents in Georgia and around 40% in Armenia were actually employed at the time of the survey. The intention to migrate is positively correlated with the lack of work in these countries: potential migrants are less likely to have a job compared to non-migrants. Currently, 37% of potential migrants are working compared to 40% of non-migrants in Armenia. The figures for Georgia are 27% and 31%, respectively, a motivating factor for emigration. Interestingly, the situation is the opposite in Morocco: a higher share of potential migrants work (55%) compared to non-migrants (48%), so the intention to migrate is positively correlated with having a job. This may be linked to the specificity of non-migrants, who are more likely to be women with a much lower level of education (or no education) in Morocco. A low level of education or no education decreases labour market participation, especially among women. Finally, returnees seem to be the most employed group in all countries (less so in Georgia). Morocco shows the highest difference, with 68% of returnees employed compared to 48% of non-migrants. This may be interpreted as a positive impact of migration on both activity levels and employability.

GRAPH 4.7 INTENTION TO MIGRATE BY WORKING STATUS (%)
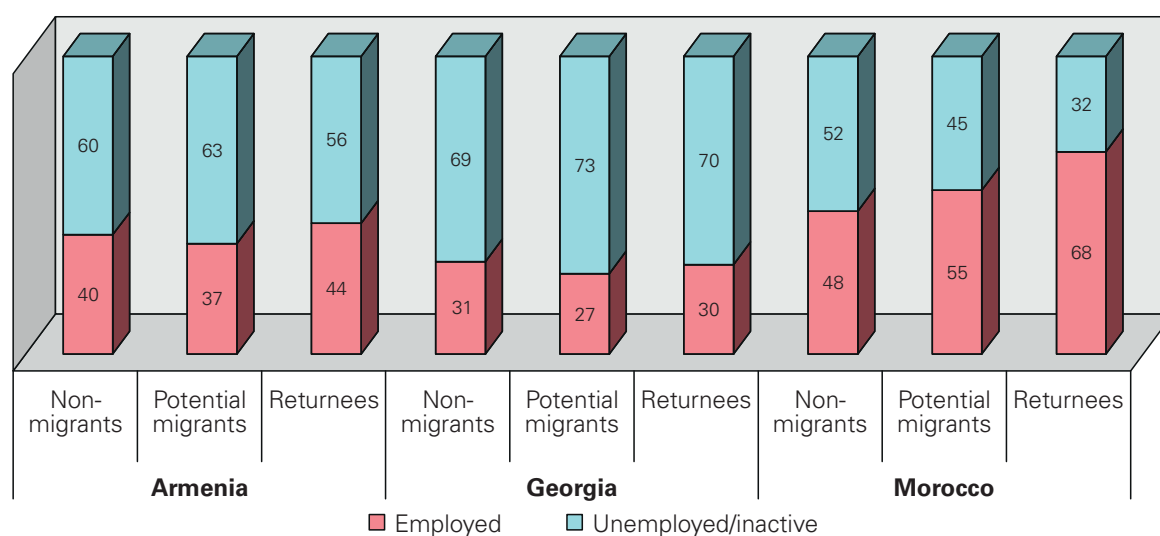
Note: Missing data less than 1% except for the group of potential migrants in Morocco (3%). The employed consist of those who were working at the time of the interview or those who were on holiday, strike or sickness leave.

The status of 'currently not working' might be linked to either unemployment or inactivity, and gender has an impact on this relationship. In both Armenia and Georgia, being out of work has no significant effect on the desire to migrate for women; indeed more working women intend to migrate in general. While unemployed men are more likely to express a desire to migrate, one-quarter of Georgian men who were seriously thinking of moving abroad had been employed. The figure rose to around 40% among those who did not wish to go abroad. The pattern was similar in Armenia – half (52%) of males who did not wish to go abroad had worked compared to 39% of males who were seriously thinking of moving abroad; so men's desire to migrate is more responsive to unemployment.

Given higher inactivity among women, **TABLE 4.3** presents the activity, employment and unemployment rates among the three groups (total, male and female rates). Although the activity rates of men are quite similar across the three sub-groups (except Georgia), the activity rates of women significantly increase after the migration experience in all three countries. Indeed, women's activity rates are the highest among returnees and the lowest among non-migrants. The largest difference is reported in Morocco: 65% of female returnees are economically active compared to 33% of female non-migrants. Interestingly, the employment rates of men are highest among non-migrants and lowest among potential migrants, signalling the sensitivity of migration intention to employment (though less so in Morocco). Women again exhibit the opposite trend with the highest employment rates among returnees. Thus, female non-migrants who tend to be inactive make the difference in particular in Morocco.

TABLE 4.3 ACTIVITY, EMPLOYMENT AND UNEMPLOYMENT RATES OF POTENTIAL MIGRANTS, NON-MIGRANTS AND RETURNEES (%)

	Activity rate Total (M/F)	Employment rate Total (M/F)	Unemployment rate Total (M/F)
Armenia			
Non-migrants	76 (85/69)	40 (52/31)	47 (39/55)
Potential migrants	80 (84/75)	37 (39/33)	54 (53/56)
Returnees	86 (87/81)	44 (43/50)	49 (51/38)
Georgia			
Non-migrants	73 (88/61)	31 (37/26)	58 (58/58)
Potential migrants	81 (87/72)	27 (27/28)	66 (69/61)
Returnees	90 (94/84)	30 (31/29)	66 (67/65)
Morocco			
Non-migrants	57 (83/33)	48 (75/25)	15 (10/25)
Potential migrants	70 (85/49)	55 (71/32)	21 (16/34)
Returnees	80 (84/65)	68 (71/53)	15 (15/18)

Note: Missing data less than 5% except for the group of potential migrants in Morocco (8%); the figures in brackets represent males (M) and females (F).

Finally, the unemployment rate of both men and women tends to be highest among potential migrants, followed by returnees. Indeed, the intention to migrate is positively correlated with higher unemployment rates in all three countries, reaching a total of 66% in Georgia, 54% in Armenia and 21% in Morocco. On the other hand, women returnees in Armenia and Morocco have the lowest unemployment rate. The much lower unemployment rate in Morocco can be explained by high inactivity among women and a high share of individuals working in agriculture, artificially increasing employment levels. Despite all the cautions mentioned before, therefore, migration intention is largely linked to unemployment and the migration experience itself seems to increase activity and employment levels, especially for women.

The nature of employment also affects migration. In Armenia, potential migrants are more represented among casual workers and the self-employed and less represented in salaried jobs. Similarly, potential migrants include more casual workers in Morocco and more self-employed people in Georgia. This reflects the fact that a more stable employment situation discourages migration. In Armenia, most potential migrants work as skilled or unskilled workers, while in Georgia most of them are skilled workers. Non-migrants are over-represented among professionals and skilled workers in both countries. In Morocco, potential migrants mainly work as unskilled workers and are under-represented in all other fields. This indicates that more limited skills contribute to a desire to leave the country. Returnees were less likely to work as professionals compared to non-migrants and potential migrants in Armenia and Georgia, though in Morocco they were more than three times as likely to work as professionals than the other two groups.

In all three countries, potential migrants are the least represented groups in public administration. These jobs tend to be attractive since they are typically permanent and so carry a degree of security. Furthermore, the sectors that non-migrants and potential migrants are currently working in or were most recently working in are very similar, with a distinct profile for returnees in the three countries. The most obvious difference in Armenia is the larger proportion of returnees working in construction: 21% compared to 17% of potential migrants and only 6% of non-migrants. This is also true for Georgians, where construction accounts for 22% of returnees' employment. It is only in Morocco where returnees are less represented in the construction sector. It should be emphasised that it is typically male migrants who worked in the construction sector abroad in all countries.

In Armenia, with the exception of construction, returnees have a very similar profile to non-migrants and potential migrants. There is no obvious evidence of a pattern favouring returnees in the labour market. In contrast, in Georgia and especially in Morocco, returnees appear to reflect a more 'modern' employment profile. The proportion working in agriculture is much smaller than other groups in Georgia and in Morocco. Returnees are also much less commonly found in the domestic and personal services sector (a sector which, in contrast to construction, is much more common for women). In Georgia, returnees are over-represented in construction, whereas in Morocco

(where most returnees work) they are concentrated in the services sector, such as in hospitality or information and communications technologies (ICT).

4.4 MOST LIKELY AND MAIN DESTINATIONS

It can be assumed that in most cases the actual destinations of returnees reflect the migration realities of potential migrants more accurately than the aspirations of would-be migrants. Although the data does not include migrants who never returned, it largely represents the contrast between the reality of migration possibilities and the uncertainty of potential migrants' aspirations. In both Armenia and Georgia, the most frequent destinations for returnees are less popular among potential migrants. The vast majority of Armenian migrants returned from Russia (85%), and although Russia is also the most commonly cited likely destination among potential migrants, the proportion in this case falls to just above half. This pattern is clearer in Georgia, with more diverse destinations following the deterioration of relations with Russia.

TABLE 4.4 presents the most likely and main destinations for both potential migrants and returnees in the three countries. Potential migrants in both Armenia and Georgia (especially the highly educated) are more likely to express a preference for migrating to countries in North America and Western Europe in numbers far exceeding the proportion of returnees from those destinations.

TABLE 4.4 MOST LIKELY AND MAIN DESTINATION COUNTRY FOR ARMENIA, GEORGIA AND MOROCCO (%)

Destination	Armenia		Georgia		Morocco	
	potential	returnees	potential	returnees	potential	returnees
Russia	56	85	12	29	-	0
France	7	1	3	1	38	30
Germany	5	1	11	4	5	3
Spain	2	0	2	1	12	21
Italy	1	0	12	1	9	16
UK	2	0	3	1	1	1
Greece	0	1	5	13	-	0
Belgium	1	0	0	0	5	4
Netherlands	0	0	1	0	3	5
Turkey	0	1	13	32	0	0
Ukraine	1	2	3	4	-	0
Azerbaijan	0	0	7	3	0	-
USA	10	2	13	3	4	2
Canada	2	0	1	0	5	2
Saudi Arabia	-	-	-	-	3	2
United Arab Emirates	0	0	-	-	2	2
Qatar	-	-	-	-	2	1
Libya	-	-	-	0	0.2	3
Other/don't know	14	5	14	7	10	6

Note: Data for potential migrants refers only to those who intend to migrate (n=892 in Armenia, n=852 in Georgia and n=1 086 in Morocco); missing data less than 2% except for the group of potential migrants in Georgia (7%) and in Morocco (6%).

The USA is clearly the most popular choice for the highly educated in both Armenia and Georgia. Together, the USA, Canada and five EU destinations (France, Germany, the UK, Spain and Italy) account for about 30% of the most likely destinations cited by Armenian potential migrants (mostly highly skilled), compared to only 5% in the case of returnees in that country. Similarly in Georgia, almost half of all potential migrants (mostly highly skilled) cite the USA, Canada or one of the five EU countries as their most likely destination, but only 12% of Georgian returnees have actually returned from those countries. It is not entirely clear whether this reflects purely the aspirations of potential migrants or the fact that most highly skilled migrants never returned back from those destinations.

The discrepancy between the destinations of returnees and the most likely destinations cited by potential migrants can be explained by a natural preference for migrating to the wealthiest countries where they expect to find better jobs. However, when faced with the realities of migration, many of them may find that it is actually much more difficult to reach these desirable destinations. A larger proportion thus settle for the more common destinations of Russia, Turkey and Greece. In this case, the pattern reported by returnees may well be a reflection of the overall pattern of emigration. It is also possible that there is a more direct connection between the widespread negative experience in certain destinations among the populations and a rejection of those destinations among potential migrants. The data does not allow us to determine which of these hypotheses is accurate, but the second hypothesis would reflect the recent perception of social networks at home and abroad as points of information and not simply poles of attraction.

GRAPH 4.8 shows the top three most likely destinations for potential migrants and the top three main destinations for returnees by education level in Armenia. The most important destinations for the Armenian returnees are Russia (85%), the USA (3%) and Ukraine (1%). The shares of the three most likely destinations for potential migrants are slightly different: Russia (57%), the USA (10%) and France (6%). Visa-free entry to Russia, historical links and geographical vicinity make this destination the dominant one for Armenians. As seen in the graph, the share of low-skilled migrants is quite low (except for some in Russia) and migrants with a medium level of education dominate the flows. Having said that, in terms of absolute numbers, a considerable number of highly educated migrants still go to Russia rather than to any other country, while destinations like the USA and France tend to attract more highly educated migrants as a share of the total migrants they received.

GRAPH 4.8 THREE MOST LIKELY AND THREE MAIN DESTINATIONS BY EDUCATION LEVEL PRIOR TO MIGRATION IN ARMENIA (%)
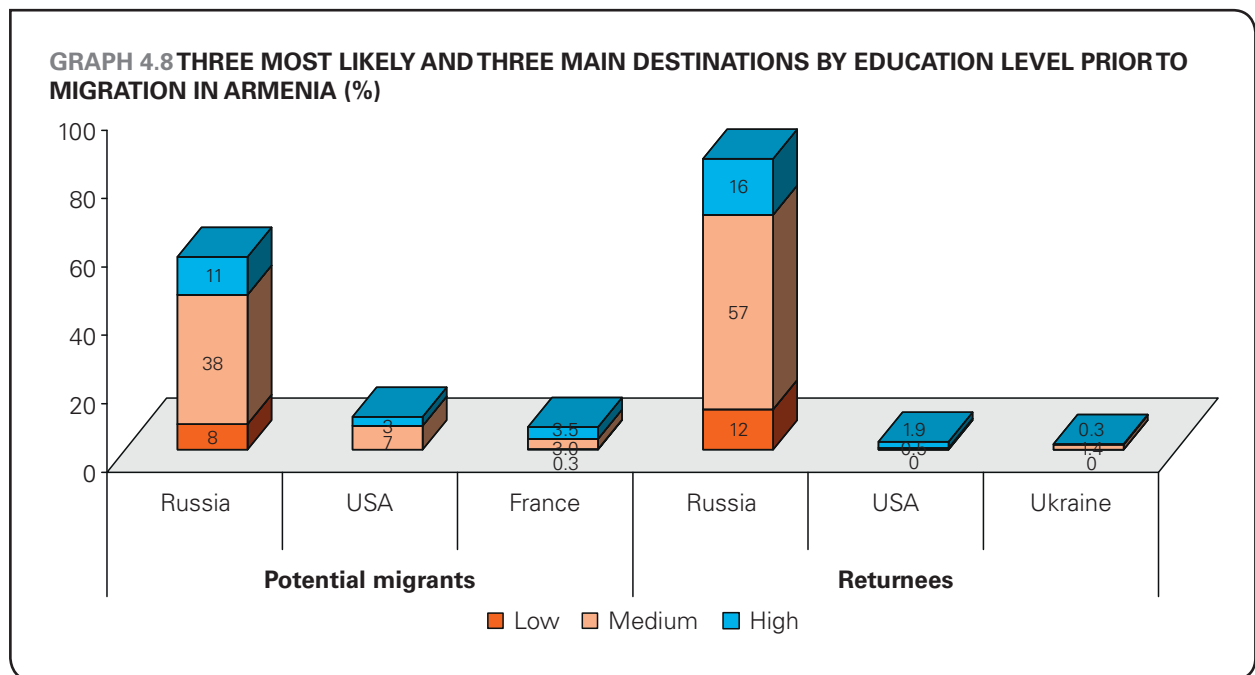
The top three main destinations for returnees and the top three most likely destinations for potential migrants are much more diverse in Georgia, ranging from Russia to Turkey, some EU destinations and the USA (**GRAPH 4.9**). The deterioration of the country's relations with Russia since 2000 and the visa requirement applied to Georgians triggered this change, together with visa-free entry to Turkey as an alternative. Georgian returnees mostly came from Turkey (32%), Russia (29%) and Greece (13%) but the percentages of potential migrants who cite these countries as their most likely destination are less than half the returnee figures: Turkey (14%), Russia (12%) and Italy (12%). The share of low-skilled migrants is very low across the board and migrants with a medium level of education dominate the flows. However, destinations like the USA and Italy attract more highly educated migrants.

GRAPH 4.9 THREE MOST LIKELY AND THREE MAIN DESTINATIONS BY EDUCATION LEVEL PRIOR TO MIGRATION IN GEORGIA (%)
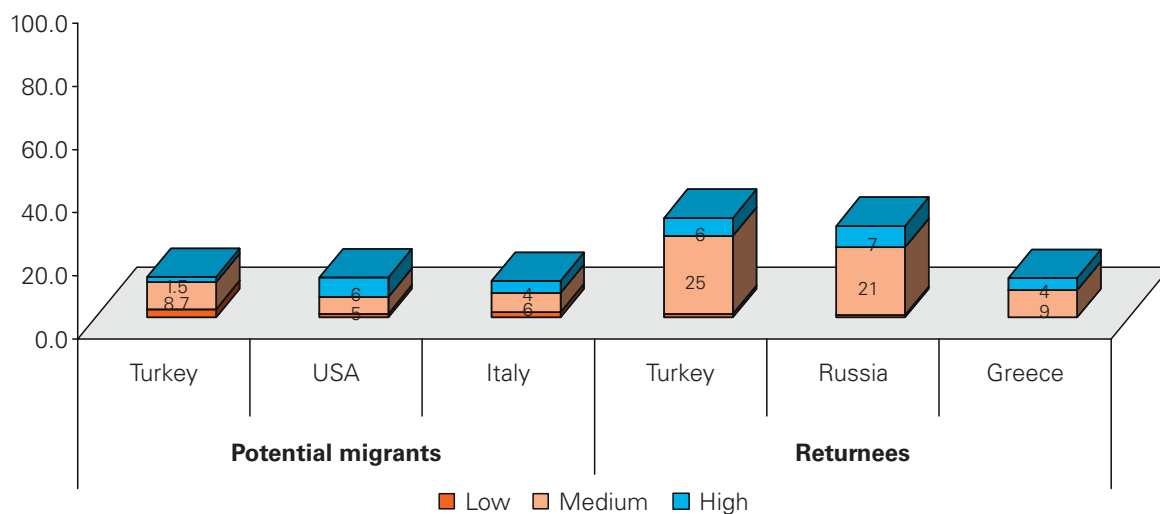
Morocco has a very different geography of migration. It is one which is dominated by Western Europe. Moroccan potential migrants cite eight Western European countries (France, Spain, Italy, Belgium, Germany, the Netherlands, Switzerland and the UK, in order of significance) that together account for 74% of expressed intentions to migrate and 81% of destinations of returnees. In contrast, the total EU share as a destination for Armenia and Georgia is low. In Georgia, 24% of migrants returned from EU countries, while this increases among potential migrants (39%). In Armenia, only 7% of migrants returned from EU countries, which increases to 19% among potential migrants. This may mean that Armenians and Georgian migrants are simply not returning with the same frequency as Moroccan migrants. Alternatively, it could reflect a change in attitude among Armenian and Georgian potential migrants as their aspirations turn more towards Europe.

GRAPH 4.10 shows a different picture of the education levels of potential migrants in the top three most likely destinations and of returnees in the top three main destinations in Morocco. The main destinations for Moroccan returnees are France (31%), Spain (20%) and Italy (16%), which are also the three most likely destinations for potential migrants in the same order of significance: France (37%), Spain (12%) and Italy (9%). It must be emphasised that returnees in our sample may not necessarily reflect the overall number of migrants in these destinations (i.e. France). This is due to the fact that our survey included only those who actually returned and many others who are established abroad in the diaspora. In all cases, the flows are dominated by migrants with a low education level in all countries, particularly in Spain and Italy. Although France is also a destination for more low-skilled potential migrants, a relatively higher share of more highly educated migrants returned from France, indicating international student flows (brain circulation). This may be explained by the higher number of Moroccans who migrated for education purposes, and France seems to be their natural preference for higher education studies.

For Morocco, the remaining 20% of non-European migration destinations expressed is accounted for partly by the USA and Canada, which figure more highly as aspirations than as actual destinations from which migrants return, particularly for the highly educated. Saudi Arabia, the United Arab Emirates and Qatar together account for the remaining 5% of destinations for Moroccans. The discrepancy between the destinations of returnees and the most likely destinations cited by potential migrants can be explained by a natural preference for migrating to the wealthiest countries where they expect to find better jobs. Nonetheless, the more highly educated were proportionally the most represented among the returnees from Canada and the USA, followed by a small number who returned from France and the UK.

GRAPH 4.10 THREE MOST LIKELY AND THREE MAIN DESTINATIONS BY EDUCATION LEVEL PRIOR TO MIGRATION IN MOROCCO (%)
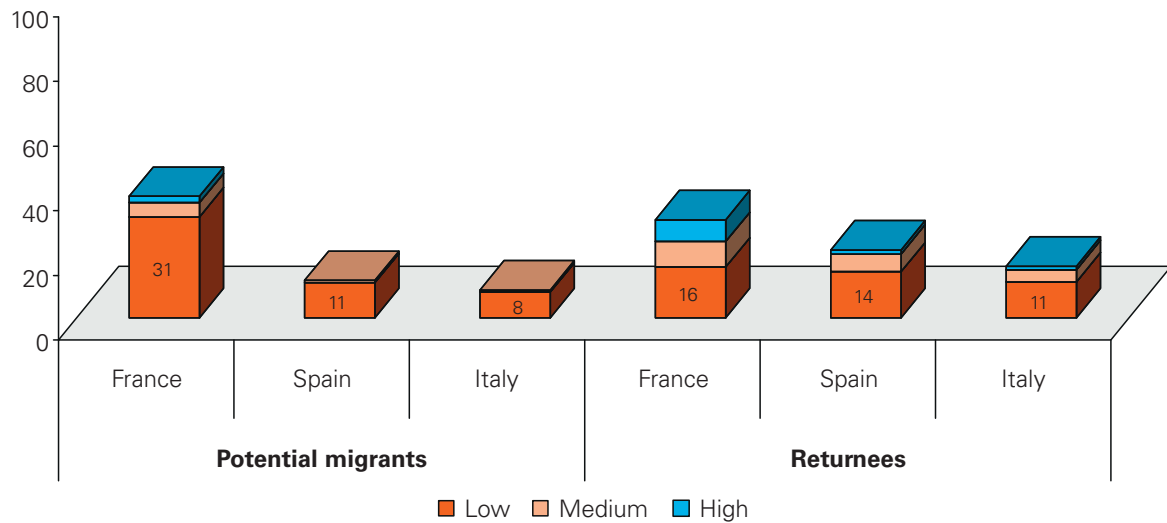
It is interesting to see which destinations are the most preferred by more highly educated migrants from the three countries and the position of the EU in attracting talent. Despite the smaller shares of potential migrants who intend to migrate to EU countries, **GRAPH 4.11** clearly shows that the EU is more attractive to highly educated potential migrants in Armenia and Georgia than to those with low or medium levels of education. This is also confirmed by a high share of Armenian and Georgian returnees with higher education whose main destination was an EU country (**GRAPH 4.12**). However, the picture is the opposite for Morocco: the share of people who would like to migrate to an EU country is higher among those with low or medium levels of education. Also, the higher educated were proportionally the most represented among the returnees from Canada and the USA. Nonetheless, the differences in preferences among the education levels are not large, which may be explained by the importance of France in the EU for Moroccans wishing to pursue post-graduate studies.

GRAPH 4.11 EU VERSUS NON-EU DESTINATIONS BY EDUCATION LEVEL PRIOR TO MIGRATION: POTENTIAL MIGRANTS (%)
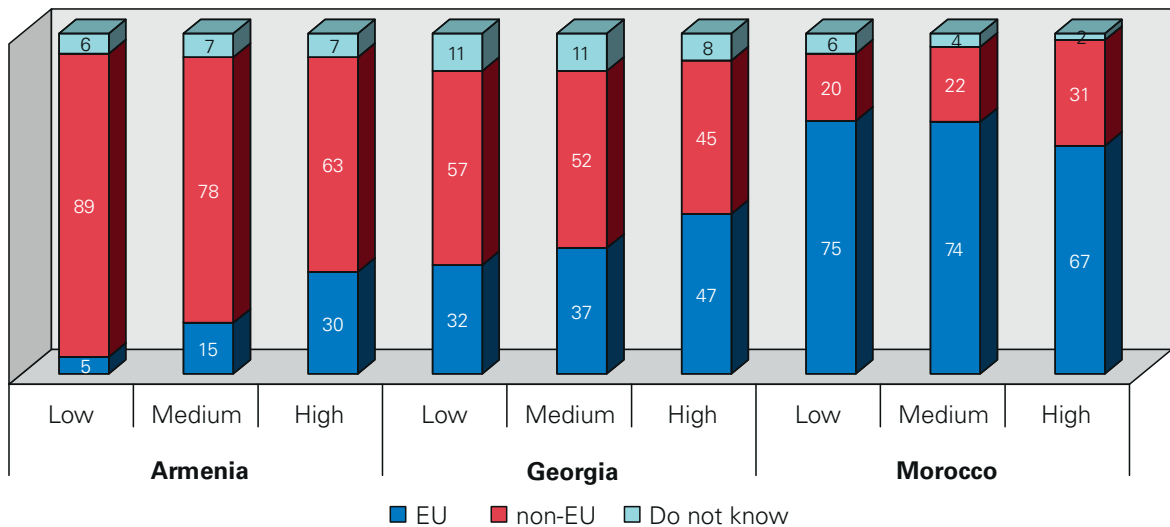
Note: Data for potential migrants refers only to those who intend to migrate (n=892 in Armenia, n=852 in Georgia and n=1 086 in Morocco); missing data less than 5% except for the group of potential migrants with a low level of education (8% in Georgia and 6% in Morocco) and a medium level of education (8% in Georgia and 7% in Morocco).

GRAPH 4.12 EU VERSUS NON-EU DESTINATIONS BY EDUCATION LEVEL PRIOR TO MIGRATION: RETURNEES (%)

	Armenia			Georgia			Morocco		
	Low	Medium	High	Low	Medium	High	Low	Medium	High
non-EU	97	94	88	90	80	64	18	19	26
EU	3	6	12	10	20	36	82	81	74

■ EU   ■ non-EU
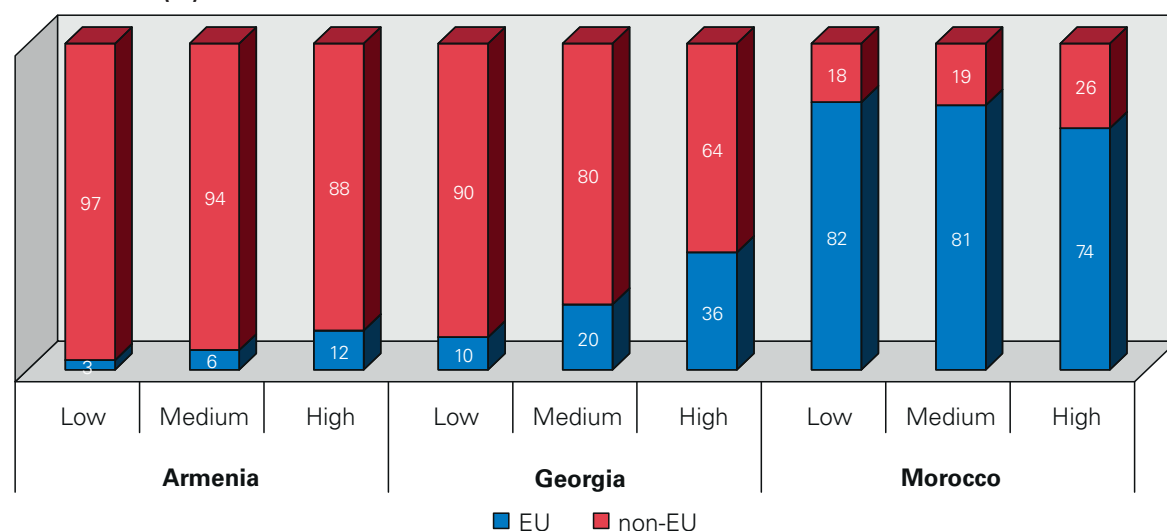
Note: Missing data less than 3%.

Gender analysis of the data on destination indicates relatively minor differences between men and women. In the case of Armenia and Georgia, the EU receives more female and more educated migrants but the best and brightest tend to migrate to the USA and Canada. Male migrants travel overwhelmingly to Russia, while much larger proportions of women returned from Germany, Greece, Poland and Turkey. The difference in the education levels of male (lower) and female (higher) migrants and the jobs available to migrants in destinations may explain these differences. The most common jobs found in Russia by men are in the construction sector. In EU countries, on the other hand, the (domestic) services sector requires female migrants. Gender difference is less pronounced in the case of Morocco, although France was cited as the dominant preference by female potential migrants (41%).

4.5 REASONS FOR RETURN AND TYPE OF MIGRATION

The reasons for return generally have much less to do with economics and tend to be much more related to family and social networks at home (**GRAPH 4.13**). The main reasons reported by returnees for their return was because their parents or spouse wanted them to return, they wanted to join their family or run the family business. In Armenia, this was the reason given by 53% of returnees, in Georgia 44% and in Morocco 26%.

Economic factors for return were not insignificant. The termination of work contracts, problems with a low income abroad, the expiration of work or residence permits or the difficulty of finding a job abroad were collectively cited by around 24% of Armenians and Moroccans and 19% of Georgians. The balance in these factors is significantly different. Armenian returnees are more likely to cite the termination of contracts and low income, while Georgian and Moroccan migrants are more likely to face the lack of renewal of work or residence permits and the difficulty of finding a new job.

This reflects the difference in destination for Armenian migrants (for whom going to Russia does not require a visa) and Moroccan and Georgian migrants, where larger numbers of migrants go to places where residence and work are more regulated. This perception is further reinforced by the fact that 19% of Georgians and 9% of Moroccans explained their return by expulsion or illegal residence, whereas this was the case for only 3% of Armenians.

GRAPH 4.13 RETURNEES' MAIN REASONS FOR RETURN (%)

Legend:
- Other
- Homesickness
- Work-related reasons
- Forced return
- Family reasons

	Armenia	Georgia	Morocco
Other	14	10	33
Homesickness	6	9	8
Work-related reasons	24	19	24
Forced return	3	19	9
Family reasons	53	44	26
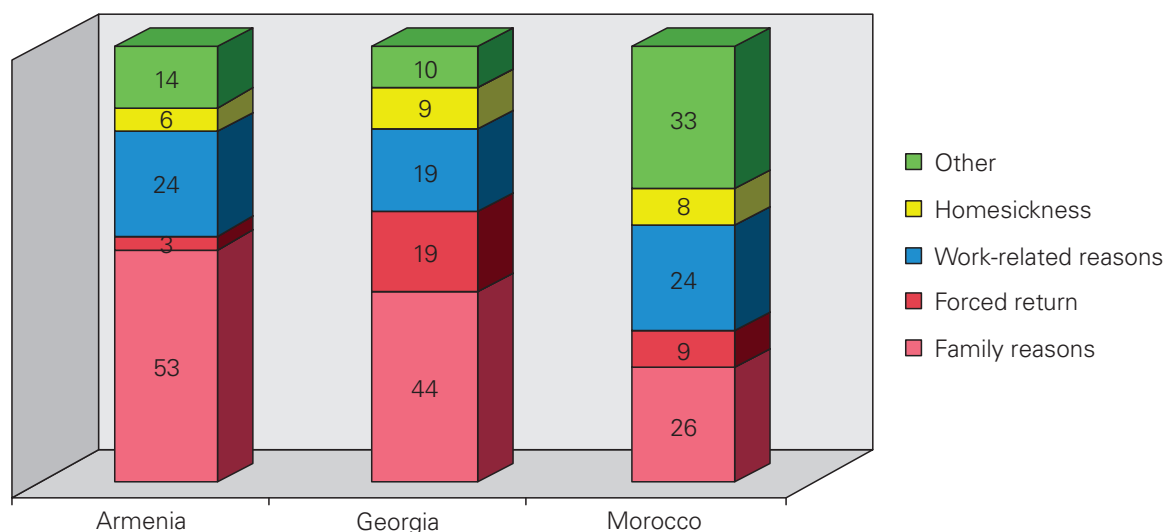
Note: Missing data less than 1% except for Morocco (7%).

As seen in **TABLE 4.5**, there is a distinction between the style of migration in all three countries. Migrations are much more frequent from Armenia than from Georgia and even less so from Morocco. A maximum of eight migrations was reported by 70 respondents in Armenia. Overall, 41% of Armenian returnees, 23% of Georgian returnees and 18% of Moroccan returnees migrated more than once, indicating a certain pattern of circularity in all three countries. The most obvious one was in Armenia. The nature and degree of circularity also influenced the duration of the migrations. For all countries there was a general decline in the duration of migrations as the number of migrations increased, though there were occasional exceptions to this pattern.

TABLE 4.5 DURATION AND FREQUENCY OF MIGRATIONS OF RETURNEES

	Armenia	Georgia	Morocco
Duration of migration			
Median time per migration	9 months	17 months	6 years
Mean time per migration	21 months	36 months	9.5 years
Median time spent in total	19 months	22 months	7.2 years
Mean time spent in total	33 months	42 months	10.7 years
Number of migrations			
One	59%	77%	82%
Two	17%	14%	11%
Three or more	23%	9%	8%

Note: Missing data related to the duration of migration less than 1% except for Georgia (12%).

Median time per migration was the shortest in Armenia (nine months). This compares with 17 months in Georgia. The longest median time per migration is recorded in Morocco (six years). This pattern of circularity is also reflected in intentions to re-migrate among the returnees (**GRAPH 4.14**). In Armenia, a large majority of returnees state an intention to migrate again (68%). In Georgia, 48% of returnees state this intention. Due to the longer migration periods spent abroad, the lesser importance of circularity and the accomplishment of their migration project, Moroccan returnees are least likely to re-migrate (29%).

GRAPH 4.14 TENDENCY TO RE-MIGRATE AMONG RETURNEES (%)
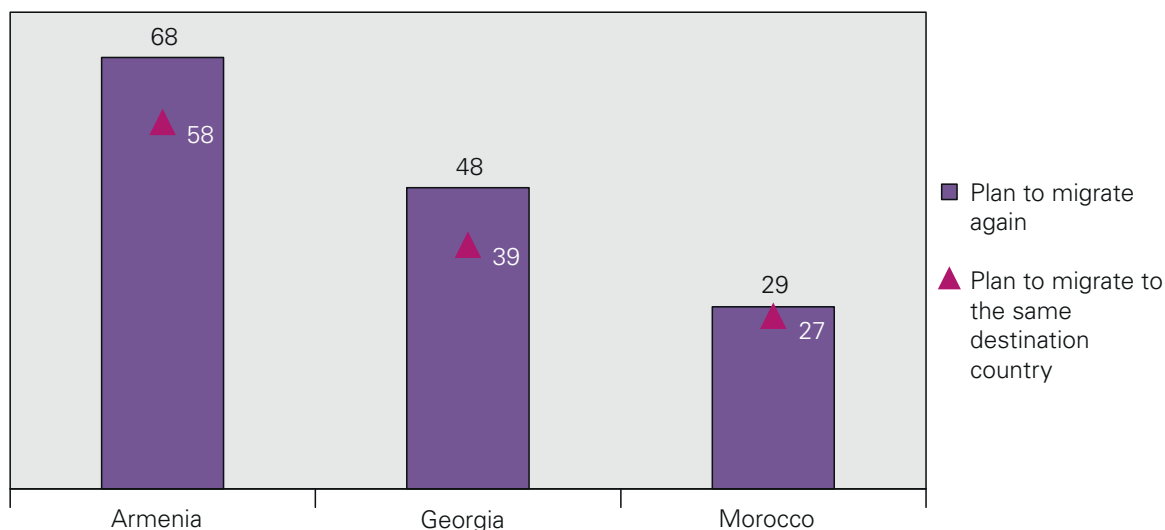
Note: Missing data less than 1%.

4.6 RETURNEES' WORK HISTORY AND USE OF SKILLS ABROAD

GRAPH 4.15 shows the share of returnees who had residence and work permits, work contracts and social security coverage. Although these are fundamental legal obligations in most countries in which migrants worked, the ETF surveys show that the vast majority of migrants had none of these things, in particular in Armenia and Georgia. There is virtually no gender difference in this almost universal absence of social protection of migrants. The only exception is Morocco, where 55% of migrants had work contracts and 27% had social security coverage. Bearing in mind that 80% of Moroccan migrants returned from an EU Member State, this reveals the presence of informal labour practices. After they return, only 3% of Armenians and Georgians can transfer their social rights. The figure is 32% for Moroccans, possibly due to longer migration periods and the relative openness of social security systems in Europe.

GRAPH 4.15 SITUATION OF RETURNEES WHILE WORKING ABROAD (%), MULTIPLE ANSWER
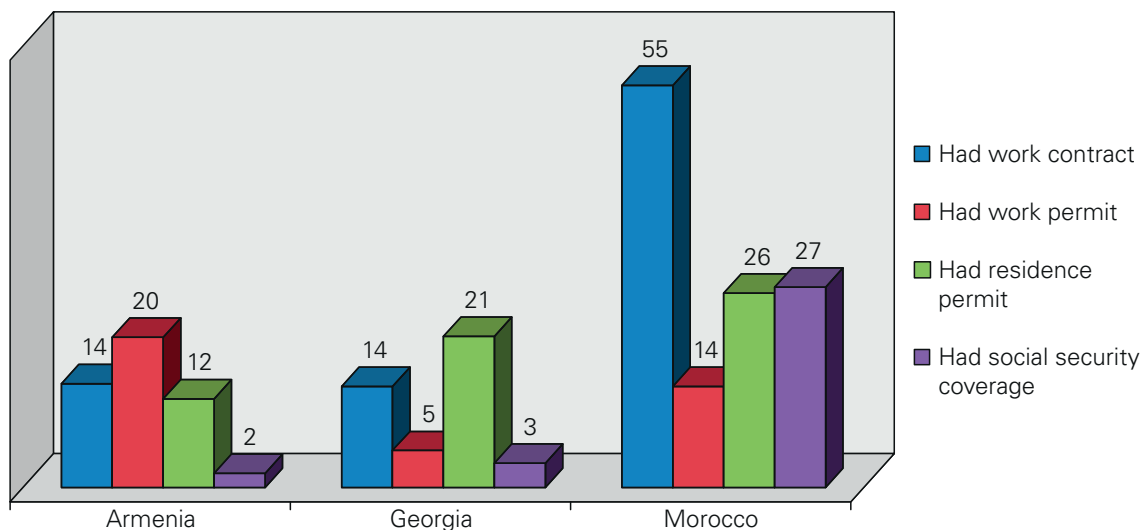
Note: Missing data less than 2%.

Undoubtedly, the most widely used strategy by both returnees and potential migrants for finding a job abroad is to get help from family members and/or friends or acquaintances who are resident in the relevant country (**GRAPH 4.16**). Indeed, 62% of returnees in Armenia, 61% in Georgia and 59% in Morocco found a job abroad with this method. Getting help from family members and/or friends or acquaintances who are in the home country is also used as the second-best strategy in all countries. The use of family and friend connections, both at home and abroad together, explains 92% of jobs found abroad in Armenia, 79% of jobs found abroad in Georgia and 72% of jobs found abroad in Morocco. The third viable strategy is the use of employment (job placement) services (public and private) both at home and abroad. Its share is 9% among the Georgian returnees and 7% among the Moroccan returnees. Moreover, 16% of potential migrants in Georgia would look for a job abroad through employment agencies, while 13% of potential migrants in Morocco would do the same thing. Finally, the use of government programmes and schemes and the internet to find a job abroad seems to account for an extremely small share in all countries.

GRAPH 4.16 **MAIN STRATEGIES USED TO LOOK FOR A JOB ABROAD BY RETURNEES AND POTENTIAL MIGRANTS (%)**
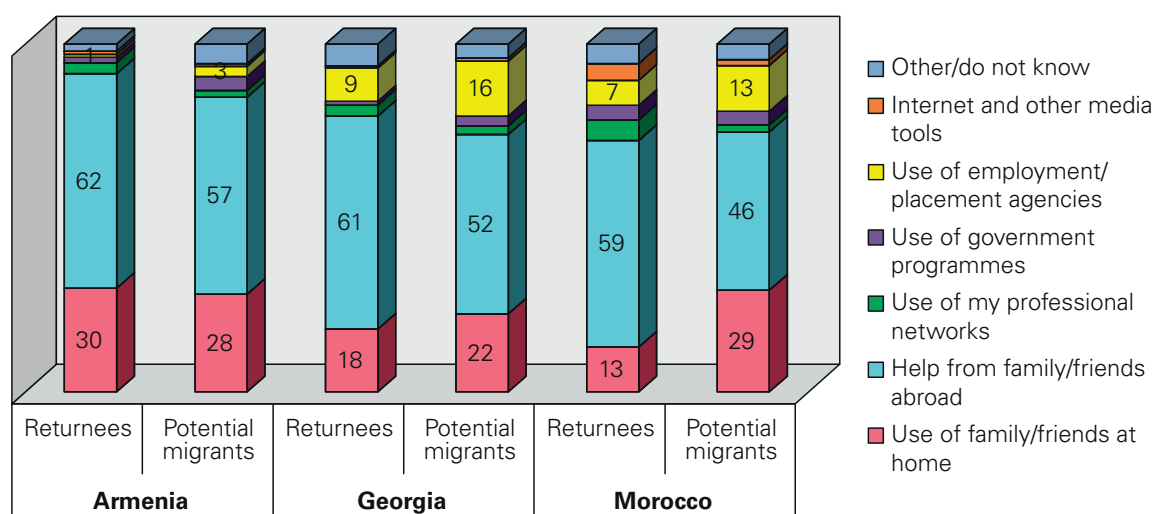
Note: Missing data less than 3% except for the group of potential migrants in Morocco (9%); data for potential migrants refers only to those who intend to migrate, excluding respondents who were counted as both potential and returning migrants and for whom the return migrant questionnaire was used (n=872 in Armenia, n=710 in Georgia and n=1 086 in Morocco).

Approximately one-third of Armenian and Georgian migrants had spent time without work while abroad. Moroccans were significantly more likely to have spent time unemployed abroad (54% compared to 30% in Armenia and 33% in Georgia). They had also spent a much longer time abroad than Armenians or Georgians – more than five times as long on average – so the more frequent unemployment could simply result from a longer period of time away. The total reported periods without work among returnees were similar in Georgia (5.5 months on average) and Armenia (5.6 months on average) but substantially longer in Morocco (10.2 months), again reflecting the longer period of migration.

The work sector abroad was distinct in all three countries and highly gendered. The majority of Armenian migrants (53%) worked in construction, almost all men. The other sectors common to Armenian migrants were commerce (12%), manufacturing (9%) and transport (8%). Georgian migrants were concentrated in construction (27%) and domestic or personal services (28%), which were the almost exclusive preserve of men and women respectively, followed by agriculture and hospitality. Moroccan returnees reported a significantly more diversified range of work sectors, orientated much more towards the services sector, with sizeable proportions reporting work in hotels or restaurants (18%) and commerce (11%), but also in agriculture (15%) and manufacturing (11%). The share of more detailed sectors by gender is specified below:

■ Armenian males: construction (59%), commerce (10%), manufacturing (8%), transport (8%), repairs (4%), petty trade (2%);
■ Armenian females: commerce (24%), manufacturing (18%), petty trade (12%), hospitality (8%), domestic service (8%), other (15%), construction (6%);
■ Georgian males: construction (42%), manufacturing (10%), agriculture (8%), commerce (8%), transport (7%), personal and domestic services (7%), petty trade (6%);

- Georgian females: personal and domestic services (57%), petty trade (11%), hospitality (8%), manufacturing (6%), commerce (4%);
- Moroccan males: hospitality (16%), construction (14%), commerce (13%), agriculture (13%), manufacturing (12%), other (10%), transport (4%), public administration (4%);
- Moroccan females: domestic service (22%), hospitality (21%), commerce (12%), manufacturing (9%), agriculture (8%), other (7%), public administration (4%).

Returnees had similar patterns of work type while abroad. The most common work type in all cases is salaried work, which dominated the experience of Georgian and Moroccan returnees, accounting for 79% and 71% of work, respectively. Armenian returnees were less likely to be salaried workers (45%) and more likely to be casual workers (43%). Given the dominance of salaried workers in all three countries, it is not surprising that the most common work levels are skilled and unskilled workers. The main difference between the countries is the exact balance between the two types. Armenia and Morocco had virtually identical proportions of returnees engaged in skilled and unskilled work – just under half unskilled and about one-third skilled. Only 22% of Georgian returnees had worked as unskilled workers, whereas two-thirds had worked as skilled workers.

When returnees' education levels prior to migration were analysed by the work types performed abroad, a low correlation was found between their education level and job type (**TABLE 4.6**). Indeed, most migrants from Armenia and Georgia worked abroad as skilled or unskilled workers, irrespective of their education level. The results show a large mismatch between the education levels of migrants and the jobs they performed abroad especially in Armenia and Georgia. Besides the limited sectors and jobs open to migrant workers, one explanation of this mismatch may be linked to the relatively low quality and labour market relevance of their education. Despite the high coverage, the education systems of these countries suffer from limited funding and the deterioration of quality as a result of transitional changes (Bardak, 2011a).

TABLE 4.6 CORRELATION BETWEEN EDUCATION LEVEL OF RETURNEES PRIOR TO MIGRATION AND JOB TYPE ABROAD (%)

Job type	Armenia			Georgia			Morocco		
	Education levels								
	Low	Medium	High	Low	Medium	High	Low	Medium	High
Senior and middle manager	4	9	14	0	0	1	4	10	30
Professional	4	7	18	3	10	21	2	3	19
Skilled worker	34	38	26	76	67	57	39	48	39
Unskilled worker	59	47	42	21	23	21	53	38	12
Other	0	0	0	0	0	0	1	1	2

Note: Missing data less than 5%.

In the case of Morocco, there is a relatively better match between the education level and the job type performed, mainly due to the overall lower levels of education. Moreover, almost half of the highly educated migrants worked as middle or senior managers or professionals, which could be facilitated by longer (and more likely legal) stays abroad and the presence of large diaspora networks. It is well established that social networks reduce the cost of migration and allow migrants to capitalise on their resources more quickly.

Returnees were also asked about their subjective opinion of the correspondence between the longest job they held abroad and their education level. In Armenia, 28% of all respondents (39% of women) considered that their job abroad was below their education level. As seen in **GRAPH 4.17,** this perception of mismatch rose dramatically among highly educated migrants (55%).

GRAPH 4.17 CORRESPONDENCE OF WORK ABROAD WITH EDUCATION LEVEL PRIOR TO MIGRATION AS PERCEIVED BY RETURNEES IN ARMENIA (%)

Low / Medium / High

- My work required the same education level but in a different field
- My work required a higher education level
- I worked below my education level
- My work fully corresponded to my education level
- Do not know
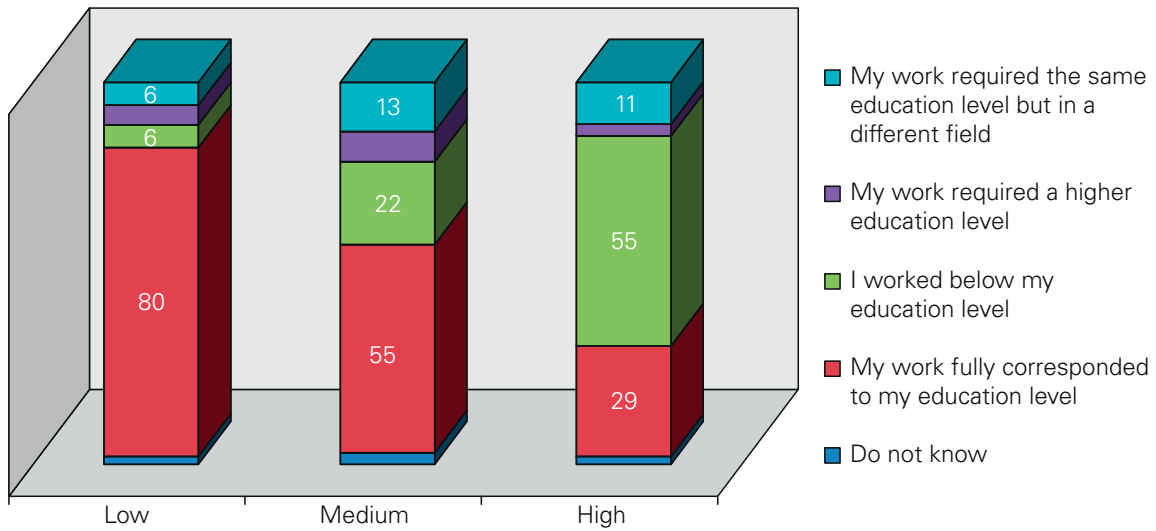
Note: Missing data less than 1%.

In Georgia, almost half of all returnees (48%) reported having had jobs below their education level, indicating a more serious brain waste potential. As seen in **GRAPH 4.18**, working below one's education level (perception of mismatch) is the most dramatic in Georgia among highly educated migrants (69%) and women (61%). Finally in Morocco, only 26% of respondents considered that their job abroad was below their education level, while this perception of mismatch increases with education level (37% of highly educated migrants), with no difference between gender (**GRAPH 4.19**).

GRAPH 4.18 CORRESPONDENCE OF WORK ABROAD WITH EDUCATION LEVEL PRIOR TO MIGRATION AS PERCEIVED BY RETURNEES IN GEORGIA (%)

Low / Medium / High

- My work required the same education level but in a different field
- My work required a higher education level
- I worked below my education level
- My work fully corresponded to my education level
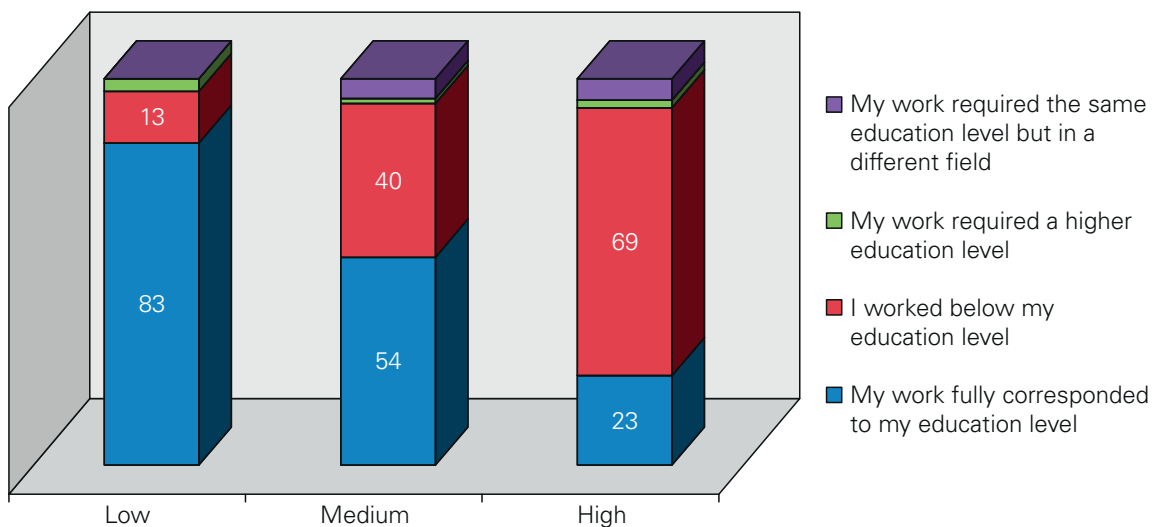
GRAPH 4.19 **CORRESPONDENCE OF WORK ABROAD WITH EDUCATION LEVEL PRIOR TO MIGRATION AS PERCEIVED BY RETURNEES IN MOROCCO (%)**

Legend:
- My work required the same education level but in a different field
- My work required a higher education level
- I worked below my education level
- My work fully corresponded to my education level
- Do not know
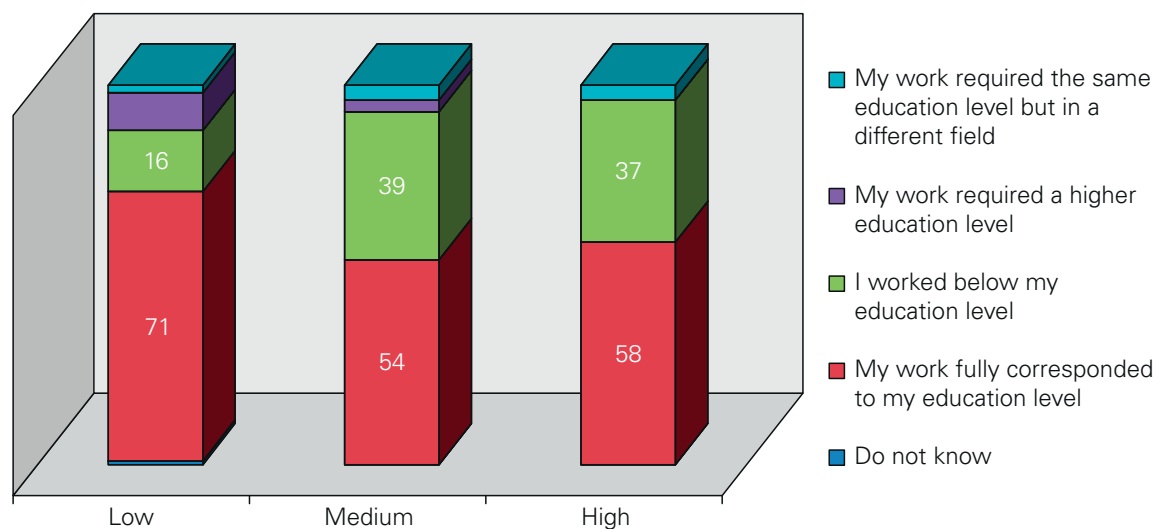
Note: Missing data less than 3% except for respondents with a low level of education (6%).

4.7 STUDY OR TRAINING ABROAD AND RECOGNITION OF QUALIFICATIONS

The opportunity to receive training or to study while abroad is one of the central potential benefits of migration. Indeed, potential migrants (both sexes) widely held the conviction that migration could enhance both their skills and qualifications. In Armenia, 64% of respondents thought that it was 'very or quite likely' that they would benefit from migration in human capital terms. In Georgia, this rises to 86% and in Morocco to 89%. This reveals a very substantial agreement that migration can potentially have significant human development benefits. Yet, as seen in **GRAPH 4.20**, the large majority of migrants in all three countries reported having received no education or training abroad.

GRAPH 4.20 **STUDY OR TRAINING RECEIVED ABROAD BY RETURNEES (%)**

Legend: Yes   No
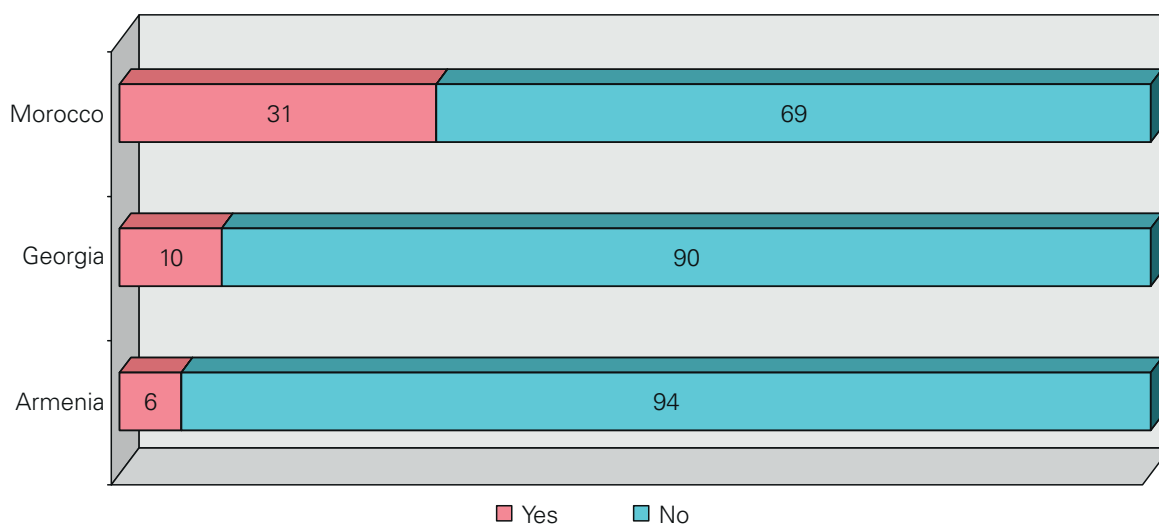
Note: Missing data less than 1%.

This picture varies by country and by gender. Armenian and Georgian migrants were less likely to have received any education or training, particularly in the case of men. Overall, 10% of Georgians and 6% of Armenians received some kind of education or training abroad. On the other hand, quite a high share of Moroccans reported that they received education or training abroad (31%), while women were less likely to receive training than men. The greater incidence of training among Moroccan migrants can be partly explained by the longer period of migration abroad, but also by the fact that education was more frequently the aim of their migration.

Migrants were also asked about the recognition of their qualifications abroad. As shown in **GRAPH 4.21**, almost one-third of returnees received formal recognition of their qualifications abroad: 30% in Georgia and 32% in Morocco. This share is much lower in Armenia (14%). There is certainly a higher interest among potential migrants in having their qualifications recognised abroad: 55% in Armenia, 45% in Morocco and 42% in Georgia. An examination of recognition practice by country of destination does not give a clear trend or pattern among different destinations. Depending on the size of migrant flows in a given destination, the share of returnees whose qualifications were recognised largely differs in every destination. Therefore, the actual number of returnees whose qualifications were recognised in the destinations specified is given below:

■ Georgians: Russia (142), Turkey (101), Greece (34), Germany (30), USA (19), Ukraine (18), Azerbaijan (11), UK (6), Israel (6);
■ Moroccans: France (175), Spain (35), Italy (35), Belgium (26), Canada (20), USA (19), United Arab Emirates (15), Netherlands (11), Germany (10), Saudi Arabia (14);
■ Armenians: Russia (139), Germany (6), USA (6), Georgia (4), France (3).

GRAPH 4.21 RECOGNITION OF QUALIFICATIONS ACQUIRED ABROAD BY RETURNEES AND POTENTIAL MIGRANTS (%)

Morocco
- Potential migrants: Yes 45, No 55
- Returnees: Yes 32, No 68

Georgia
- Potential migrants: Yes 42, No 58
- Returnees: Yes 30, No 71

Armenia
- Potential migrants: Yes 58, No 42
- Returnees: Yes 14, No 86

■ Yes ■ No
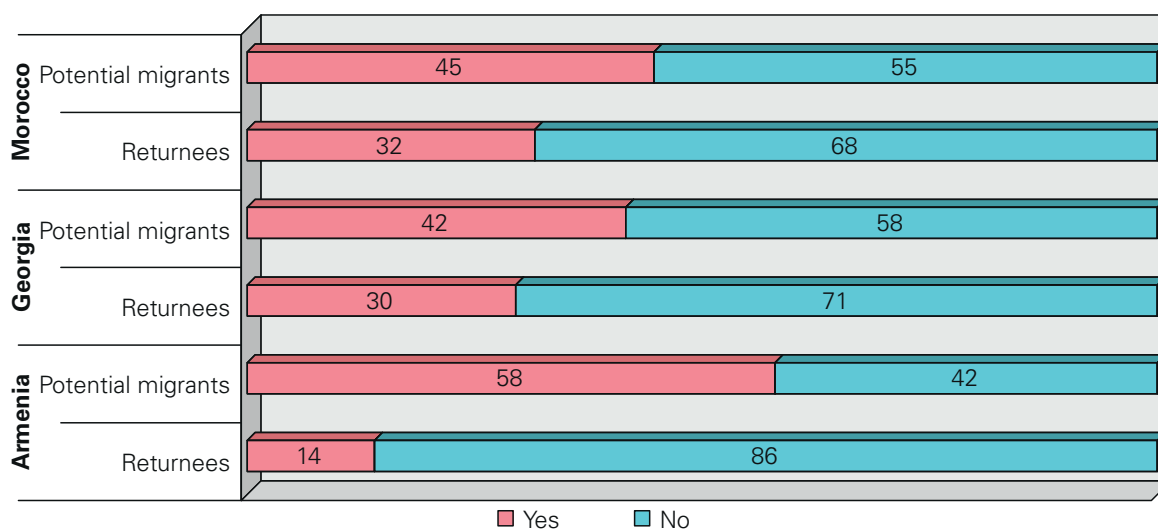
Note: Missing data less than 1% except for the returnees in Morocco and Armenia (both 6%) and the group of potential migrants in Morocco (17%); potential migrants data refers only to those who think that they find work corresponding to their educational qualifications, excluding respondents who were counted as both potential and returning migrants and for whom the return migrant questionnaire was used (n=422 in Armenia, n=431 in Georgia and n=647 in Morocco).

Looking at the experience of qualification recognition by education level, it is obvious that mainly highly educated returnees got recognition and mainly highly educated potential migrants who think to apply for recognition (**GRAPH 4.22**). It is more difficult for those with medium (and VET) education levels to access recognition. A common trend in Armenia and Georgia is the low level of recognition received by returnees, even among the highly educated group (one-quarter in Armenia and one-third in Georgia). Moroccan returnees, however, indicated a higher degree of recognition, particularly for the highly educated (72%) and those with a medium education level (43%). A higher degree of participation in education by Moroccan migrants may have required better knowledge and higher recognition of academic qualifications. In all countries, potential migrants have higher expectations for the recognition of their qualifications abroad, as a higher share expressed interest in applying for such a mechanism.

GRAPH 4.22 RECOGNITION OF QUALIFICATIONS ACQUIRED ABROAD BY EDUCATION LEVEL PRIOR TO MIGRATION (%)
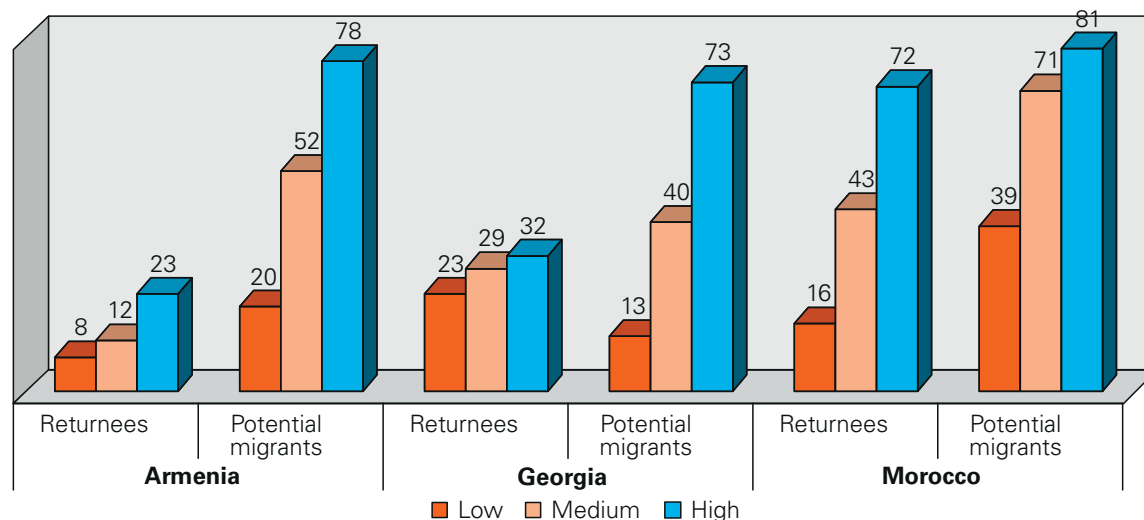
Note: Missing data less than 5% except for the returnees with a low education level in Morocco and returnees with a medium education level in Armenia (both 7%) and the group of potential migrants in Morocco (17% for respondents with a low education level; 16% for respondents with a medium education level; 14% for respondents with a high education level); potential migrants data refers only to those who think that they find work corresponding to their educational qualifications, excluding respondents who were counted as both potential and returning migrants and for whom the return migrant questionnaire was used (n=422 in Armenia, n=431 in Georgia and n=647 in Morocco).

4.8 MIGRATION AND RETURN OUTCOMES

For a more systematic analysis of migration and return outcomes, two composite indicators were developed for returnees. The migration outcome indicator brings together nine variables relating to the period of time spent abroad and aggregates different dimensions of a returnee's legal and work status abroad. The variables include: career progression abroad; the fit between skill levels and the type of work abroad; work or residence permit; legal status; fair treatment at work; the recognition of education qualifications; skill development opportunities; periods of unemployment; and remittances sent home.

The return outcome indicator, which focuses only on the migrants' experiences since they returned, assesses the impact of labour migration on different dimensions of post-return work and current economic status. It combines six variables: the savings brought home; employment upon return; post-return opportunities for career progression; social benefits linked to migration; usefulness of migration in finding a job at home; and the returnee's subjective assessment of the benefits of migration. Based on the scores received in both indicators, the returnees were classified into three outcomes, indicating gain or loss from migration.

As seen in **TABLE 4.7**, the migration experience abroad was considered more successful than the return experience in all three countries. Higher success rates of migration abroad were reported in Morocco (72%) and Armenia (67%). While Georgia displays a less optimistic picture for successful migration abroad (55%), more than half of migrants considered the outcome to be successful. However, a sizeable 40% state that migration did not make any difference. With regard to return outcomes (as opposed to migration outcomes), many returnees in Georgia and Armenia reported no impact on their lives after return (47% and 41%, respectively). Some even reported unsuccessful returns. Moroccan returnees were most likely to perceive that their return was successful – 69% of them stated that it was 'successful or very successful'. In Armenia, more than half of returnees (56%) reported successful returns, while they were less than half in Georgia. These results paint a somewhat mixed picture of migration and return, particularly in Georgia and Armenia. It seems that most migrants undoubtedly benefited from the immediate impact of migration, mainly through sending remittances to families, but they were less successful in turning their migration experience into a sustained improvement in their living standards when they returned. Lower education levels of migrants and longer migration periods may have contributed to better outcomes in Morocco.

For a more in-depth analysis of the situation, the economic and social conditions of migrants are also analysed through two composite indicators. The economic conditions index was calculated on the basis of house and land ownership, overall household income from all sources (equalised monetary income) and the receipt of remittances. The social conditions index aggregates information about living conditions and basic household possessions (number

TABLE 4.7 RETURNEE DISTRIBUTION BY MIGRATION AND RETURN OUTCOME (%)

	Armenia	Georgia	Morocco
Migration outcome			
Successful or very successful	67	55	72
No difference at all	30	40	22
Unsuccessful or very unsuccessful	3	5	7
Return outcome			
Successful or very successful	56	45	69
No difference at all	41	47	23
Unsuccessful or very unsuccessful	2	8	8

Note: Missing data regarding migration outcome = 13% for Armenia, 8% for Georgia and 21% for Morocco; missing data regarding return outcome = 28% for Armenia, 19% for Georgia and 50% for Morocco.

of people living in the household, number of rooms and the presence of indicative facilities such as piped drinking water, hot water, indoor flush toilet, modern heating system, colour TV, washing machine, computer, internet connection and car).

GRAPH 4.23 compares the economic conditions of the returnees, potential migrants and non-migrants. Out of the three countries, only Morocco shows much better economic conditions in the households of returnees, which is linked to more successful migration and return. Indeed, the share of households with better economic conditions is 17% among returnees, compared to 8% for households with no migrants and 6% for households with potential migrants. The share of households with worse economic conditions is also higher among the potential migrants dataset than that of returnees (around 30% versus 23%). In Armenia and Georgia, however, almost no difference was observed between the economic conditions of the returnee households and those of the households in the potential migrant datasets.

GRAPH 4.23 ECONOMIC CONDITIONS INDEX FOR POTENTIAL MIGRANTS AND RETURNEES (%)

		Better conditions	Average conditions	Worse conditions
Morocco	Non-migrants	8	61	31
	Potential migrants	6	65	29
	Returnees	17	60	23
Georgia	Non-migrants	15	69	16
	Potential migrants	20	65	15
	Returnees	20	66	15
Armenia	Non-migrants	18	66	15
	Potential migrants	19	64	17
	Returnees	21	60	19

■ Better conditions ■ Average conditions ■ Worse conditions
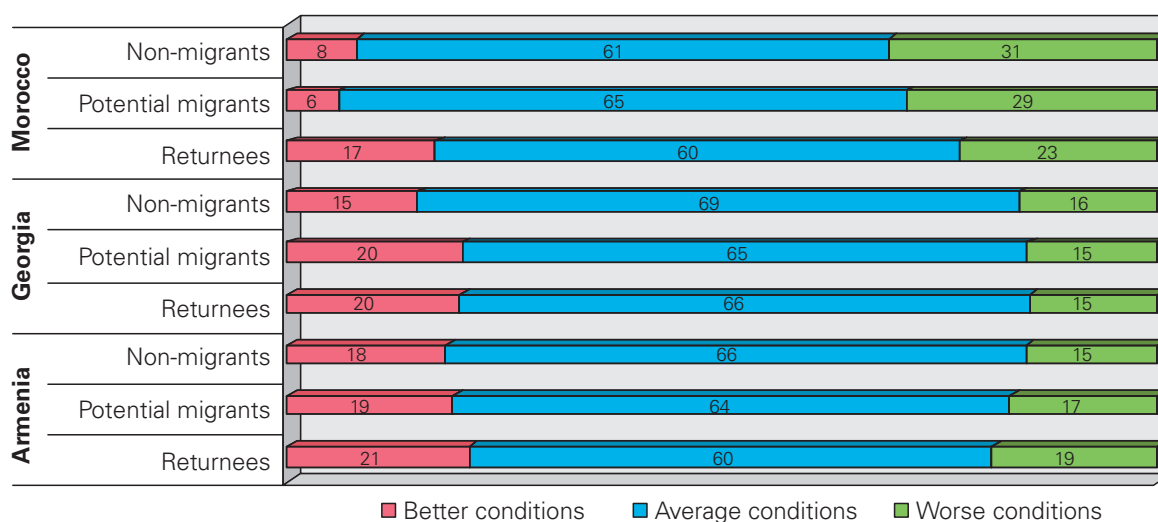
Note: Missing data equal to 20% (returnees) and 17% (potential migrants and non-migrants) in Armenia; 20% (returnees), 19% (potential migrants) and 11% (non-migrants) in Georgia; and 15% (returnees), 25% (potential migrants) and 27% (non-migrants) in Morocco.

Similarly, **GRAPH 4.24** compares the social conditions of the returnees, potential migrants and non-migrants. Again, almost no difference was observed between the social conditions of returnees and those of potential migrants in Armenia and very little difference was observed in Georgia. Thus, the migration experience does not change social conditions in these countries. In the case of Morocco, however, there is a dramatic improvement in social conditions in the returnees' households, which is linked to the more successful migration experience. In fact, the share of households with better social conditions doubles among returnees (66%) compared to 34% of non-migrant households and 31% of potential migrant households. At the same time, the share of households with worse social conditions decreases to a mere 6% among returnees compared to 25% among potential migrants.

GRAPH 4.24 SOCIAL CONDITIONS INDEX FOR POTENTIAL MIGRANTS AND RETURNEES (%)

		Better conditions	Average conditions	Worse conditions
Morocco	Non-migrants	34	47	20
	Potential migrants	31	43	25
	Returnees	66	28	6
Georgia	Non-migrants	33	46	22
	Potential migrants	32	47	21
	Returnees	35	45	20
Armenia	Non-migrants	33	46	21
	Potential migrants	34	47	19
	Returnees	33	45	22

■ Better conditions ■ Average conditions ■ Worse conditions
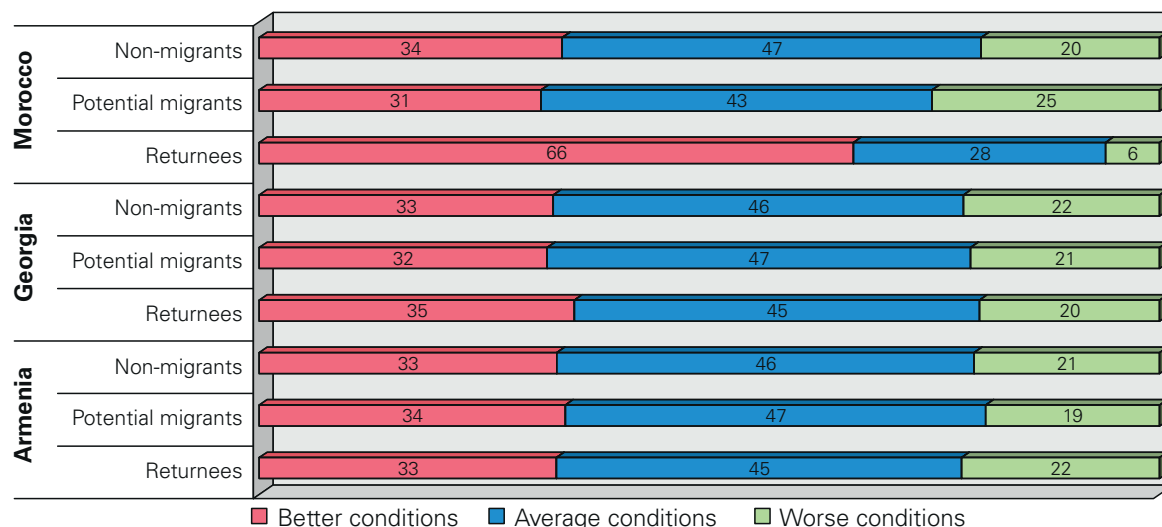
Note: Missing data less than 5% except for the group of returnees in Georgia (6%) and the group of potential migrants in Morocco (22%).

5. ANALYSIS OF RESEARCH QUESTIONS

Following a descriptive analysis of the eight variables relating to the human capital, skills and employment of migrants in the previous chapter, this chapter attempts to analyse the six questions introduced in Chapter 2. To do this, we examine cross-tabulations of relevant data to identify the key relationships. The range of compound indicators discussed in the survey methodology section will contribute to this discussion.

5.1 DOES SEASONAL, TEMPORARY OR CIRCULAR MIGRATION BRING MORE BENEFITS TO MIGRANTS?

The assumption that circular migration has important benefits for all concerned is at the heart of the policy approach of mobility partnerships. As discussed in Section 4.5, the three countries have large variations in their patterns and duration of migrations. Armenia displays the highest rate of circularity with the shortest time intervals (nine months), while Morocco shows the lowest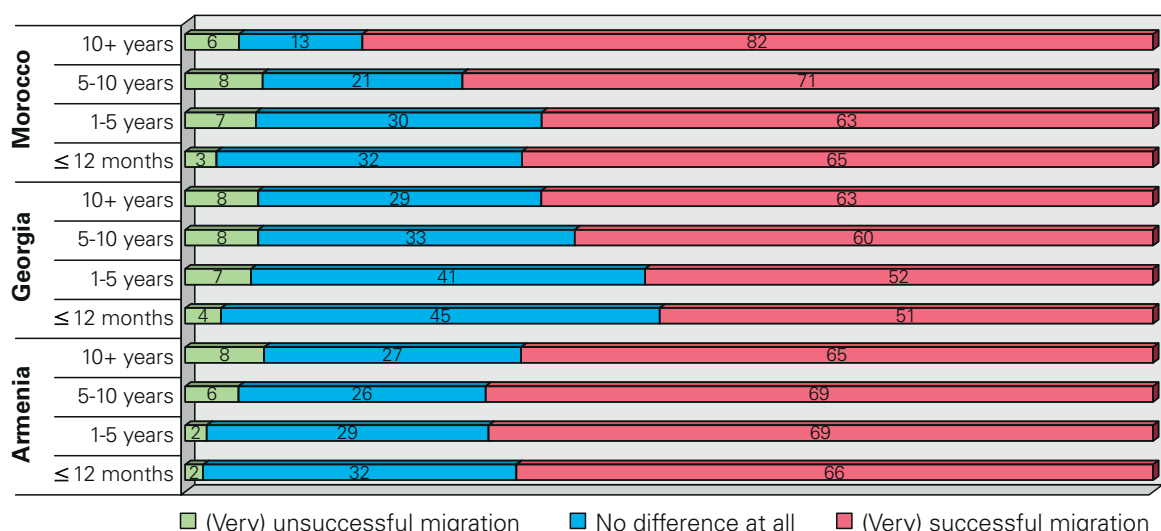 circularity and much longer duration (six years on average). Georgia is in between. **GRAPH 5.1** shows the correlation between the migration outcome indicator, the compound indicator that brings together a range of potential benefits, chiefly for the migrant and their families (e.g. remittances, limited time unemployed), and the period of time spent abroad. There is very little reliable research evidence on whether (and if so, how) the possibility of benefiting from migration is affected by the period of time spent abroad.

Graph 5.1 shows that, in the case of both Morocco and Georgia, the share of successful migrations gradually increases with the time spent abroad. On average, Moroccan migrants stay abroad for much longer and the cohorts increase in size with time. The share of successful migrations increases significantly for migrants who remain abroad for 5 to 10 years (71%) and for migrants who spend more than 10 years abroad (82%). On the other hand, migration tends to be more unsuccessful in the case of migrants who remain abroad for 1 to 5 years (7%) and migrants who spend 5 to 10 years abroad (8%). Despite a lower share, the situation is similar in Georgia, where successful migrations increase with time: 63% of those who spend more than 10 years abroad compared to 51% of those staying less than a year. The 'no difference' category as a result of migration is also larger among those staying less than five years. At the same time, the share of unsuccessful migrations clearly increases among those staying longer than a year: 7% of migrations lasting one to five years, 8% of migrations with more than five years.

GRAPH 5.1 RETURNEES' MIGRATION OUTCOME BY TIME SPENT ABROAD (%)

		(Very) unsuccessful	No difference	(Very) successful
Morocco	10+ years	6	13	82
	5-10 years	8	21	71
	1-5 years	7	30	63
	≤ 12 months	3	32	65
Georgia	10+ years	8	29	63
	5-10 years	8	33	60
	1-5 years	7	41	52
	≤ 12 months	4	45	51
Armenia	10+ years	8	27	65
	5-10 years	6	26	69
	1-5 years	2	29	69
	≤ 12 months	2	32	66

☐ (Very) unsuccessful migration ☐ No difference at all ☐ (Very) successful migration

Note: Missing values equal to 11% for less than 12 months (n=536), 14% for 1 to 5 years (n=626), 19% for 5 to 10 years (n=178), 11% for 10+ years (n=55) in Armenia; less than 8% (all time periods) for less than 12 months (n=490), 1 to 5 years (n=454), 5 to 10 years (n=171), 10+ years (n=115) in Georgia; 17% for less than 12 months (n=111), 19% for 1 to 5 years (n=421), 19% for 5 to 10 years (n=372), 24% for 10+ years (n=493) in Morocco.

Armenia clearly has a different pattern, which is not linked to the time period spent abroad. A higher share of successful migrations (69%) is observed only for durations of 1 to 5 years and 5 to 10 years. However, staying more than 10 years slightly decreases the share of successful migrations (65%) and increases the share of unsuccessful migrations (8%), showing a slight polarising pattern between the shortest and the longest durations of stay. A slight but consistent increase in unsuccessful migrations following a longer time abroad is interesting in all three countries, but only the data from Armenia shows some benefits for shorter and medium-term migration. The data from Morocco and Georgia does not provide any support for the benefits of shorter migration periods; on the contrary, benefits increase with time. It must be emphasised that the cohort staying for more than 10 years abroad is too small for a meaningful analysis in both Armenia and Georgia, and this may be the explanation for the inconclusive results.

For a better visualisation of the results, **GRAPH 5.2** combines the share of migrants with an unsuccessful outcome and those for whom no difference applies, and compares this data with the share of migrants with a successful outcome. As the graph shows, in Armenia the duration of time spent abroad has clearly no impact on the likelihood of successful or unsuccessful migration outcomes. The lines are stable over time and this may be linked to the relatively shorter and circulatory movements typical in Armenia. However, in Georgia and Morocco, the longer the time spent abroad, the more successful the migration outcomes. Indeed, after five years of stay abroad, the share of successful migrations increases and the share of unsuccessful or 'neutral' migrations decreases consistently in both countries. This polarising pattern is more apparent in the case of Morocco where the difference between successful and unsuccessful or 'neutral' migrations is much larger.

GRAPH 5.2 RETURNEES' MIGRATION OUTCOME BY TIME SPENT ABROAD – SUCCESSFUL MIGRATIONS VERSUS UNSUCCESSFUL/NO DIFFERENCE MIGRATIONS (%)
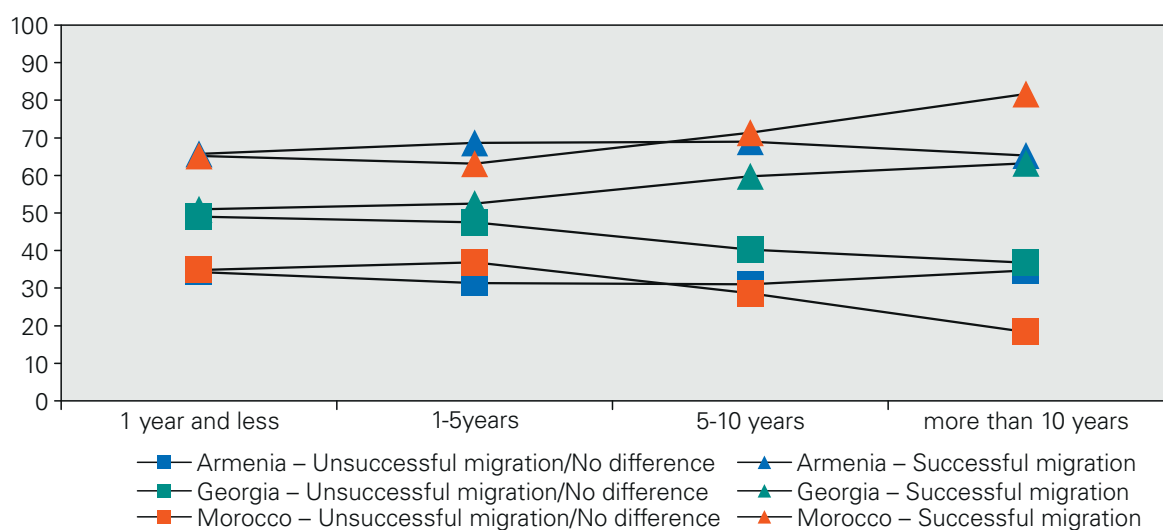

Note: Missing values equal to 11% for less than 12 months (n=536), 14% for 1 to 5 years (n=626), 19% for 5 to 10 years (n=178), 11% for 10+ years (n=55) in Armenia; less than 8% (all time periods) for less than 12 months (n=490), 1 to 5 years (n=454), 5 to 10 years (n=171), 10+ years (n=115) in Georgia; 17% for less than 12 months (n=111), 19% for 1 to 5 years (n=421), 19% for 5 to 10 years (n=372), 24% for 10+ years (n=493) in Morocco.

One component factor in the migration outcome indicator is the migration status of migrants in the destination country. It is widely recognised that it is much easier for migrants to benefit from migration when their status is regularised. Legal status is not a simply an either/or situation. Migrants are situated along an increasingly complex continuum going from full citizenship to illegal residency. Each of these positions offers a different package of rights. **GRAPH 5.3** shows that 21% of Georgian migrants and 14% of Moroccan migrants were illegally resident while living in their main destination country. There are clear gender variations in this situation, with female migrants in Georgia much more likely to lack legal status.

GRAPH 5.3 MAIN STATUS ABROAD REPORTED BY RETURNEES (%)

■ Citizenship ■ Permanent/long-term permit ■ Limited/short-term permit ■ Legal entry/stay ■ No legal status

Note: Missing data equal to 1% in Armenia, 6% in Georgia and 4% in Morocco.
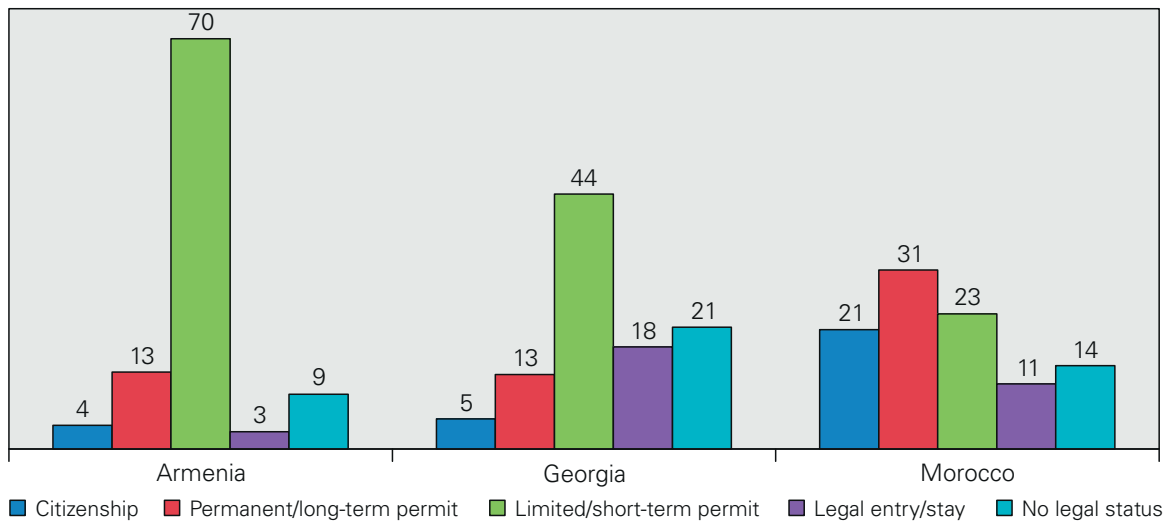
Full citizenship is very limited for Armenian and Georgian migrants and given the predominantly limited duration of their migrations and the fact that the main destination countries for Armenians and Georgians do not readily grant citizenship to foreigners this is understandable. Indeed, the share of short-term permits is the highest in Armenia (70%) and Georgia (44%). On the other hand, 21% of Moroccans have been naturalised in their main destination country. Taking all four categories together, relatively high rates of legal residency were reported overall (around 80%). This is in stark contrast to the low share of work contracts or social rights reported in the destination country.

Linked to circular migration is the question of whether portability of pension rights encourages circularity and increases the benefits of migration and return. Implementing transferable systems of social rights (such as pensions) is similar to migration support programmes in that it is clearly in the interests of the migrants concerned. However, it is probably more widely discussed than it is implemented so research evidence is very limited. It must be remembered here that the social protection coverage of the migrants abroad is very low – 2% in Armenia, 3% in Georgia and 27% in Morocco. After they return, only 3% of Armenians and Georgians can transfer their social rights. This figure rises to 32% for Moroccans, possibly due to longer migration periods.

Comparing the return outcomes of returnees who transferred pensions or social benefits (**TABLE 5.1**), the vast majority of respondents who reported that they had been able to transfer social rights also reported successful returns. This varied from 70% in Georgia and 84% in Armenia (from relatively small samples) to 95% of a much larger sample of Moroccan returnees. Even where the overall number of individuals who had been able to transfer rights was relatively small, such clear results offer strong support for the value of such systems and encouragement to those who are negotiating for the extension of the transferability of social rights.

TABLE 5.1 MIGRANTS WHO TRANSFERRED PENSION AND SOCIAL BENEFITS BY RETURN OUTCOME (%)

Return outcome	Armenia	Georgia	Morocco
(Very) successful	84	70	95
No difference at all	16	30	4
(Very) unsuccessful	0	0	2

Note: Data refers only to those with pension and social benefits rights (n=42 in Armenia, n=48 in Georgia and n=445 in Morocco); missing data equal to 24% in Armenia, 17% in Georgia and 55 % in Morocco.

Other migrants did not accrue pension or social security benefits while abroad mainly because they had not contributed to such schemes in Armenia (65%) and Morocco (51%). In Georgia, the vast majority of migrants reported that such schemes did not exist (79%). In some cases, this may result from a lack of awareness. It is possible that Armenian and Moroccan migrants contributed to social security schemes without being aware of doing so and so did not claim transferable rights to which they were entitled. Similarly, it would be surprising if such a large proportion of Georgian migrants worked in situations where there were no schemes, particularly given the wide range of destinations of Georgian migrants.

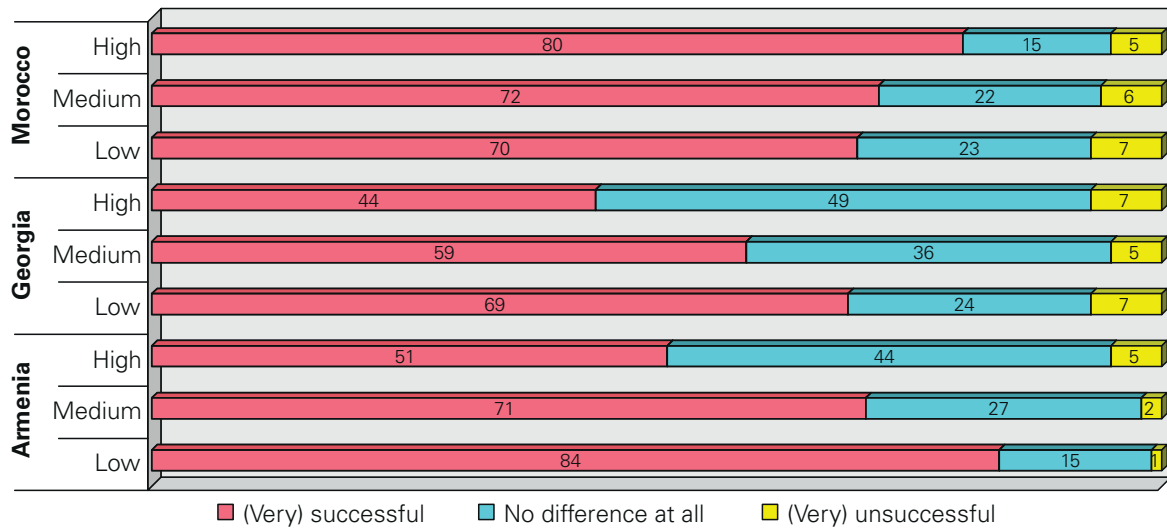## 5.2 DOES THE EDUCATION LEVEL INCREASE THE BENEFITS OF THE MIGRATION EXPERIENCE?

The relationship between human capital and migration is the key focus of the report which was elaborated in Section 4.2. First, there does appear to be a relationship between education level and interest in migration as in all countries more educated individuals are less likely to express a serious intention to go abroad. Higher education levels in Armenia and Georgia and much lower education levels in Morocco slightly change and complicate this relationship. A large proportion of completely uneducated individuals in Morocco prefer to remain in the country, suggesting an 'education hump' (similar to the famous 'migration hump' identified by Phillip Martin), whereby migration is unlikely among people with a very low level of education or no education at all. Interest in migration then gradually increases among individuals with primary and secondary education until it starts to fall again among individuals with higher education. Thus, individuals with primary and secondary education are more likely to migrate in all countries. This group forms the 'lowest-educated' category in Armenia and Georgia, while they are in the 'medium-educated' category in Morocco.

Second, a relationship also exists between education levels and the ability to migrate (as measured by the propensity to migrate indicator), which mediates interest or intention to migrate in some places. In Georgia, individuals with a low level of education are most likely to possess the necessary documentation, contacts and language ability to facilitate migration. In Armenia, there is a weak tendency for the opposite trend, with those with a higher level of education most able to migrate. This is most obvious in Morocco, where education is strongly and positively correlated with the ability to migrate. In Georgia, this trend reinforces migration since those with a low level of education have the most interest in migrating and more ability to do so. In Armenia and particularly Morocco, migration is held back as those with a university degree have the greatest facility to migrate but show less interest in doing so.

Third, interest among potential migrants in migration for education and training purposes is relatively limited and similar in all three countries, ranging from 4% in Armenia and 5% in Morocco to 7% in Georgia. Among returnees, the proportions change substantially. Only 1% of Armenian returnees were motivated to leave for education compared to 6% in Georgia and 13% in Morocco. This high proportion of Moroccan returnees who reported education as the main factor is reflected in the slight increase in human capital among returnees before and after migration. Due to the negative effect of the total lack of education on migration aspirations mentioned in the previous paragraph, Moroccan returnees seem the best-educated group overall, even before migration. This suggests a small degree of self-selectivity towards educated individuals among returnees in the case of Moroccan migration, possibly indicating a higher and sustained flow of international students.

It appears, therefore, that a higher level of education both reduces the likelihood of migration and increases the opportunity for migration (at least for migrants from Armenia and Morocco). Education levels of migrants can also have a very positive impact on migration outcomes. Therefore, the next analysis tests whether the more educated migrants were best able to benefit from the migration experience. **GRAPH 5.4** investigates this question by comparing migration outcomes with the prior education levels of migrants.

Interestingly, while the share of unsuccessful migration is very small in all education groups, the relationship between education level and successful migration outcomes is not always straightforward. In Armenia and Georgia, the group with the lowest level of education gained the most benefits from their migration experience abroad (84% in Armenia and 69% in Georgia). Successful migration outcomes were the lowest among the best-educated group, close to half of which ended with no difference after migration. In a way, this is contrary to conventional wisdom where those with a high level of education are expected to be more successful. It is probably linked to the more irregular and circular nature of migration, the variety of destination countries and the lack of migrant networks due to the relatively recent migration history.

GRAPH 5.4 RETURNEES' MIGRATION OUTCOMES BY EDUCATION LEVEL PRIOR TO MIGRATION (%)

Country	Level	(Very) successful	No difference at all	(Very) unsuccessful
Morocco	High	80	15	5
Morocco	Medium	72	22	6
Morocco	Low	70	23	7
Georgia	High	44	49	7
Georgia	Medium	59	36	5
Georgia	Low	69	24	7
Armenia	High	51	44	5
Armenia	Medium	71	27	2
Armenia	Low	84	15	1

■ (Very) successful   ■ No difference at all   ■ (Very) unsuccessful
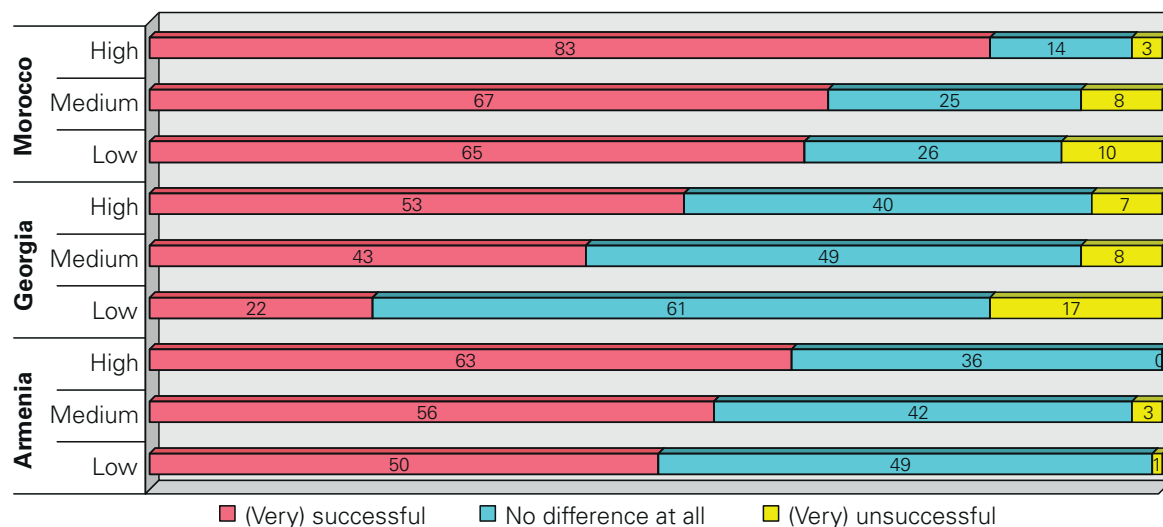
Note: Missing values equal to 11% for low level of education, 16% for medium level of education, 8% for high level of education in Armenia; 3% for low level of education, 9% for medium level of education, 6% for high level of education in Georgia; 23% for low level of education, 18% for medium level of education, 16% for high level of education in Morocco.

Contrary to this trend, migration is generally more successful among all the education groups in Morocco, compared to Armenia or Georgia and even uneducated migrants and migrants with a low level of education report high levels of success. Still, the best-educated group experienced more successful migration (80%), the share of which was the lowest among the least-educated group (70%). This may be linked to a number of factors: the generally lower education levels of migrants; the higher share of migration for education purposes; the relatively longer and more regular nature of migration; the choice of EU countries as the main destinations; and large migrant networks (diaspora) due to the longer migration history.

This difference of migration outcomes between Armenia and Georgia on the one hand and Morocco on the other can also be explained by the low correspondence between education and work levels, an important component of the migration outcome indicator. Georgian migrants were most likely to report that they worked below their education level. This trend was also very prevalent in Armenia but much less pronounced in Morocco. Logically, it is more likely for someone with higher education to work below their level of education than for someone with a primary education or less to do so. That appears to be what is driving the high levels of unsuccessful migrations among the more educated. This is further aggravated by the higher share of female migrants who were generally better educated but worked in the domestic sector in the case of Georgia.

It is interesting that this lack of success is not repeated when migrants return, where the correspondence between education levels and work is redressed. **GRAPH 5.5** indicates that the return outcomes follow the pattern of education level. The chance of a highly successful return increases and a highly unsuccessful return decreases with increasing education levels. This is a pattern visible in all three countries. Overall, the return experience is found to be much more successful in Morocco (more than two-thirds of returnees) and Armenia (between half and two-thirds of returnees). In Georgia, only half of the more highly educated migrants had a successful return; 43% of migrants with a medium level of education and only 22% of migrants with a low level of education reported a successful return. Indeed, significant numbers of migrants (as high as 61% among individuals with a low level of education) experienced no difference at all in their lives upon return. The share of unsuccessful returns is also slightly higher in all education groups in Georgia.

Overall, the migration experience was more successful than the return experience for many migrants across the countries. The value of the return outcome indicator increases gradually and consistently with each education level in all countries, but the difference between the success rates of respondents with low, medium and high education levels is much higher in Georgia. Hence, the better educated a respondent, the more they benefit from a successful return and from using their migration experience to improve their living standards in Georgia.

GRAPH 5.5 RETURN OUTCOMES BY (CURRENT) EDUCATION LEVEL (%)

Country	Level	(Very) successful	No difference at all	(Very) unsuccessful
Morocco	High	83	14	3
Morocco	Medium	67	25	8
Morocco	Low	65	26	10
Georgia	High	53	40	7
Georgia	Medium	43	49	8
Georgia	Low	22	61	17
Armenia	High	63	36	0
Armenia	Medium	56	42	3
Armenia	Low	50	49	1

■ (Very) successful   ■ No difference at all   ■ (Very) unsuccessful

Note: Missing values equal to 19% for low level of education, 29% for medium level of education, 29% for high level of education in Armenia; 13% for low level of education, 18% for medium level of education, 22% for high level of education in Georgia; 53% for low level of education, 47% for medium level of education, 38% for high level of education in Morocco.

In Morocco, it is more difficult to explain why highly educated people would return at all, if they have a choice, given the high levels of graduate unemployment (18%) compared to non-graduate unemployment (7%). More in-depth analysis on return shows that only 27% of Moroccan returnees with higher education were not working at the time of the survey, compared to 41% of those with a medium level of education and 44% of those with a low level of education. Overall, the much lower unemployment rate among returnees with a high level of education may be explained by the higher value put on education received abroad (if the returnees had studied abroad). It is also the more highly educated Moroccan returnees who often report that they acquired new skills abroad and that their experience abroad helped them to find better a job upon their return, showing that those with a higher level of education profit the most from migration in terms of skills acquisition and better job opportunities whether they studied or worked abroad.

A final consideration implicit in the relationship between migration and education is that the prospect of migration may influence the education process in the migrants' home country. It could possibly discourage education if it was seen that education would not be rewarded in a migration setting or encourage the choice of certain fields in the belief that they would lead more easily to a job overseas. This would have a negative effect on the education system and employment market in the home countries as it would mean that key decisions were driven by considerations elsewhere, rather than by the needs of the home labour market.

Data from this survey shows very conclusively that this is not happening. Tiny proportions of individuals in all three countries reported that they had chosen their field of study as it led to migration opportunities. In Georgia, only six individuals (1%) reported that this was the basis for their field of education, compared to 82% who selected their education path based on their personal interest. In Armenia, 0.3% selected their field of education on the basis of migration opportunities with personal interest again being the dominant response (75%). In Morocco, only a single individual selected their education path with migration in mind and personal interest was again the dominant response (61%). The lower rate in Morocco was accounted for by a much higher proportion reporting that they selected their field of education based on likely job prospects (21%). It is interesting that the focus of these job prospects was clearly in Morocco and not overseas. On balance, that must be good for the Moroccan education system and the Moroccan employment market.

5.3 DOES MIGRATION LEAD TO ANY BRAIN GAIN?

Migration policy can influence the value of migration to individuals if a country has an education system that supports human capital development. This requires the individuals concerned to show an interest in participating in education and training. As discussed in Section 4.7, migrants (both male and female) were in broad agreement that migration could potentially enhance individuals' qualifications and skills. Indeed, 64% of respondents in Armenia, 86% in Georgia and 89% in Morocco reported that they were 'very or quite likely' to benefit from migration in human capital terms. This reveals very substantial agreement that migration can potentially have significant benefits.

Almost paradoxically, many fewer migrants report that they undertook education or training abroad in support of those qualifications and skills. As mentioned in Section 4.7, overall 6% of Armenians (but 15% of Armenian women), 10% of Georgians and 31% of Moroccans received education or training abroad. The fact that almost one-third of Moroccan returnees received some kind of training abroad is significant, which is in line with almost one-third of returnees in Morocco and Georgia receiving recognition of qualifications acquired abroad. **TABLE 5.2** shows the education levels of migrants before and after migration, where it can be clearly seen that the share of Moroccan migrants with higher education increases four percentage points after migration.

TABLE 5.2 EDUCATION LEVELS OF RETURNEES BEFORE AND AFTER MIGRATION (%)

Education level	Armenia		Georgia		Morocco	
	before	after	before	after	before	after
No schooling	-	-	-	-	20	18
Primary and less	1	1	0	0	22	23
Lower secondary	12	11	2	2	17	17
Upper secondary general	42	40	40	39	18	15
Upper secondary VET	9	9	18	18	4	4
Post-secondary VET	14	15	10	10	4	4
Higher education (incl. PhD)	23	24	29	31	15	19

Note: Missing data equal to 1% in Armenia (education after migration) and 8% in Morocco (education after migration).

GRAPH 5.6 provides details of the study or training received by those small numbers of returnees who reported receiving education or training in all three countries. The total populations of concern are: 83 from Armenia, 138 from Georgia and 430 from Morocco. Of these returnees, the training received appears to have been extremely variable, but language training and vocational training were the most significant focuses of training, followed by (post-) graduate courses and workplace training.

GRAPH 5.6 TYPE OF STUDY OR TRAINING RECEIVED ABROAD BY RETURNEES (%), MULTIPLE ANSWER

- ■ Language training
- ■ Vocational training
- ■ (Post-)graduate courses
- ■ Workplace training
- ■ Cultural orientation
- ■ Entrepreneurship training
- ■ ICT courses
- ■ Citizenship training
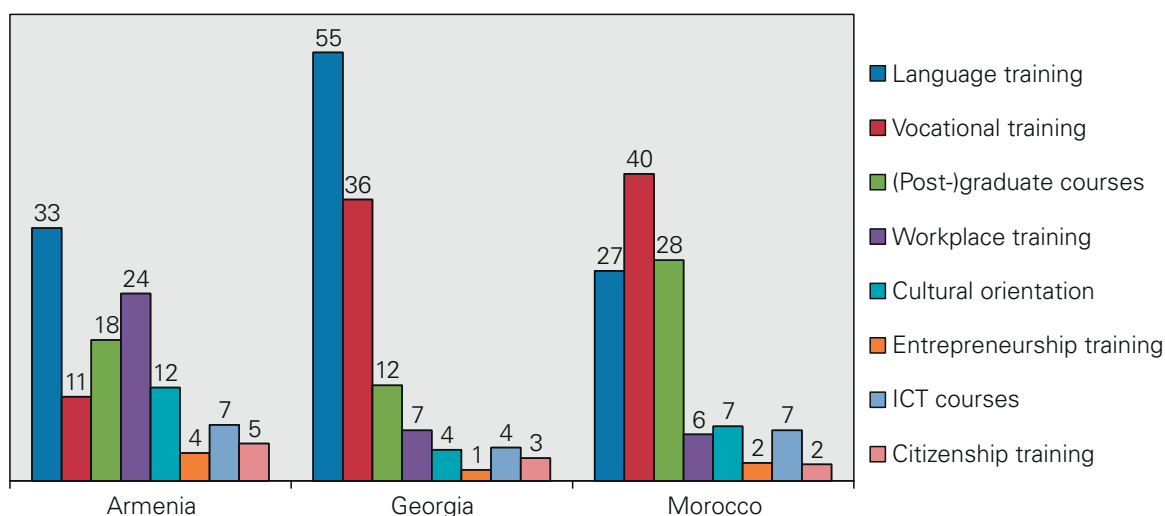
Note: Data refers only to those who received education or training abroad (n=83 in Armenia, 138 in Georgia and 430 in Morocco).

In Armenia, one-third of those who received training (only 6% of returnees) received language training, one-quarter received workplace training and 18% engaged in some kind of post-graduate course. In Georgia, more than half of those who received training were engaged in language training, more than one-third took part in vocational training and 12% took post-graduate courses. In Morocco, the training received was similarly varied. Vocational training was the most significant, reported by 40% of those who received training, followed by post-graduate courses (28%) and language training (27%).

GRAPH 5.7 presents the results of another question about skills and experiences gained abroad, without asking about the type of training received. As the graph indicates, 65% of Georgians, 35% of Armenians and 19% of Moroccans reported that they did not acquire any skills or experiences abroad. Among those who reported that they had gained useful skills and experiences abroad, the responses were, to a large extent, the same in all three countries. More than half of Moroccan respondents, 44% of Armenian respondents and 13% of Georgian respondents acquired vocational and technical skills. Language skills were also widely cited (62% in Morocco, 44% in Armenia, 13% in Georgia), followed by skills related to work ethics, social skills and entrepreneurial skills.

GRAPH 5.7 **SKILLS OR EXPERIENCES ACQUIRED ABROAD BY RETURNEES (%), MULTIPLE ANSWER**
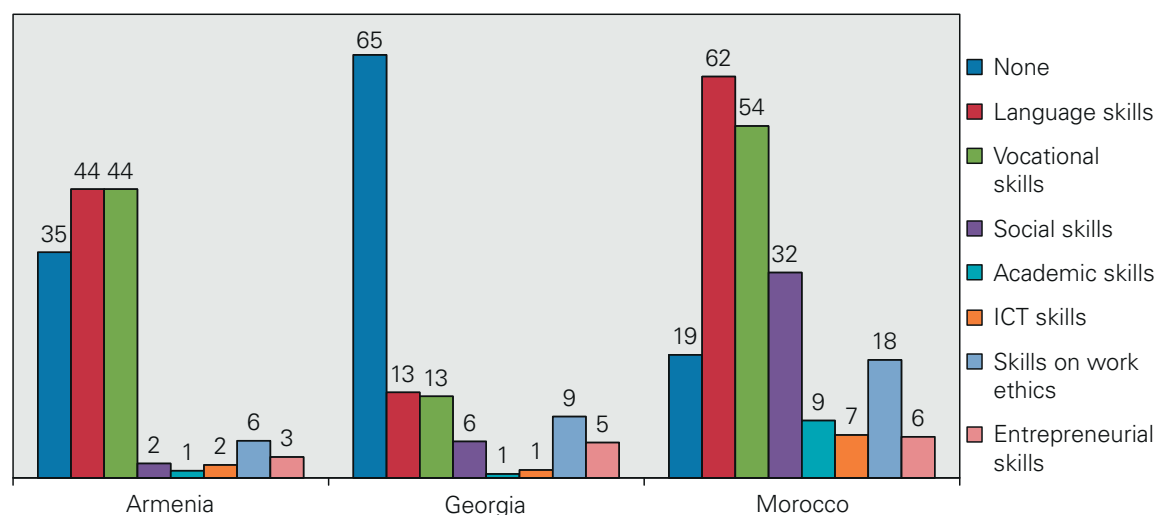
Note: Missing data less than 1%.

A key additional piece of supplementary information is the low share of educated or trained returnees who could prove their new skills and training by a certificate. Out of the returnees who acquired new skills and experiences abroad, 7% of Armenian returnees, 19% of Georgian returnees and 27% of Moroccan returnees received a certificate. The overall picture seems to be that for the majority of returnees, it is difficult to demonstrate the skills value of their migration once they return.

In summary, despite the lower levels of formal attendance of migrants in education or training activities abroad, a higher share of migrants (81% in Morocco, 65% in Armenia and 35% in Georgia) learn new skills and experiences while working abroad. However, in most cases, these newly acquired skills and experiences are not validated with a certificate, and therefore the skills value of their migration is not visible in the labour market upon return.

5.4 DOES WORK EXPERIENCE ABROAD IMPROVE THE LABOUR MARKET CHANCES OF RETURNEES AT HOME?

The central question here is whether the skills and experience gained abroad can be translated into a smooth career progression for migrants when they return home. The fact that a very small proportion of individuals received some kind of certificate for the skills learnt abroad makes this harder, but there are other ways in which skills and experience may be recognised. Working after return may be the sign of appreciation of skills linked to the migration experience. As discussed in Section 4.3, the employment level is generally low for all three sub-groups (Graph 4.5), especially in Georgia and Armenia, but returnees seem to be the most employed group in all countries (less so

in Georgia). The employment rate of returnees is the highest in Morocco (68%), followed by Armenia (44%) and Georgia (30%). Therefore, the migration experience increases chances of employment, especially among women. The most significant impact is seen in Morocco.

Out of those who have worked since they returned home, only one-third or more of Armenian and Georgian returnees reported that their experience abroad had helped them find a job on return. This compares to a significant majority (64%) of Moroccan returnees (**GRAPH 5.8**). Thus, having worked abroad does not necessarily help upon return in Armenia and Georgia. This may be linked to the limited use of existing skills abroad due to skill mismatches (Section 4.6) and their subsequent deterioration as well as poor opportunities on the local labour market at home. In Morocco, on the other hand, the situation differs, suggesting that migration can bring new skills and experiences with more benefits to returnees. Still, it must be kept in mind that returnees were the most educated group in Morocco.

GRAPH 5.8 USEFULNESS OF SKILLS GAINED ABROAD IN FINDING A JOB AND IN THE DAILY WORK EXPERIENCE (%)

Country	Category	Yes	No
Morocco	Used in daily work	83	17
Morocco	Finding a job	64	36
Georgia	Used in daily work	68	32
Georgia	Finding a job	42	58
Armenia	Used in daily work	46	54
Armenia	Finding a job	32	68

Legend: ■ Yes ■ No

Note: Data refers only to those who found work upon return (n=580 in Armenia, n=416 in Georgia and n=844 in Morocco); missing data less than 4%.
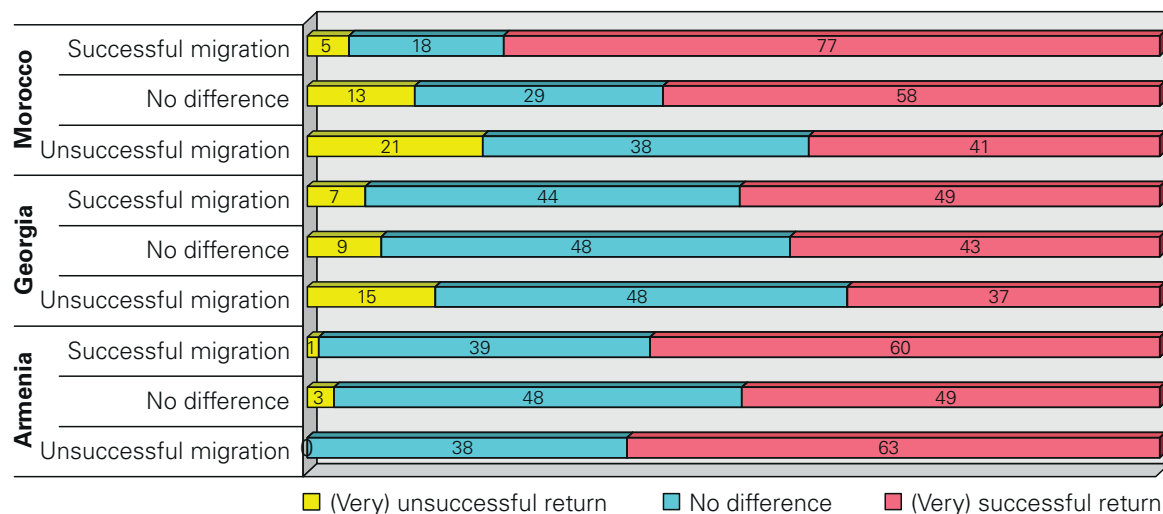
A much larger proportion of migrants in all three countries reported that they used their skills gained abroad in their daily work, though this was still a minority in Armenia (46%). Clear majorities in Georgia (68%) and Morocco (83%) found skills and experiences abroad useful in their daily work. There were no gender differences in this data in Armenia and Morocco. Again, gender differences were slightly more obvious in Georgia, with women slightly less likely to report useful experiences. This is more significant given the larger proportion of women in the return migrant category and the main type of work they performed abroad (domestic services).

Comparing the work type performed by potential migrants and returnees, the share of salaried workers decreases among returnees in Armenia and Georgia (**GRAPH 5.9**). This can be expected given their reduced contacts with home and the fact that they have been away for a while. However, the situation is reversed in the case of Morocco. More returnees than potential migrants are employed as salaried workers (51% versus 44%). Moreover, the share of employers doubles among returnees: 14% of returnees became employers compared to 7% of potential migrants in Morocco. This may be linked to the long tradition of micro enterprises in a largely informal economy, a high preference on the part of the workforce for starting their own business and the need to start a business, mainly shaped by the lack of opportunities in wage employment. Nonetheless, this result indicates a strong positive impact of migration on entrepreneurship and the creation of jobs in a country with high unemployment rates, which was made possible by investing one-third of savings in business activity (see next section). This trend is much less prevalent in Georgia, but a bigger difference is observed in the group of self-employed people, whose share increased from 7% among potential migrants to 11% among returnees.

GRAPH 5.9 PERCENTAGE OF EMPLOYERS AND SELF-EMPLOYED AMONG RETURNEES AND POTENTIAL MIGRANTS (%)

		Salaried worker	Self-employed	Employer	Other
Morocco	Returnees	51	22	14	13
	Potential migrants	44	20	7	29
Georgia	Returnees	80	11	5	4
	Potential migrants	87	7	3	3
Armenia	Returnees	52	13	3	32
	Potential migrants	70	12	2	15

■ Salaried worker   ■ Self-employed   ■ Employer   ■ Other

Note: Missing data less than 5% except for the group of returnees in Morocco (19%); data refers to the current or most recent work performed; in addition, data on potential migrants refers only to those who have ever worked (n=1 737 in Armenia, n=1 856 in Georgia and n=1 669 in Morocco.
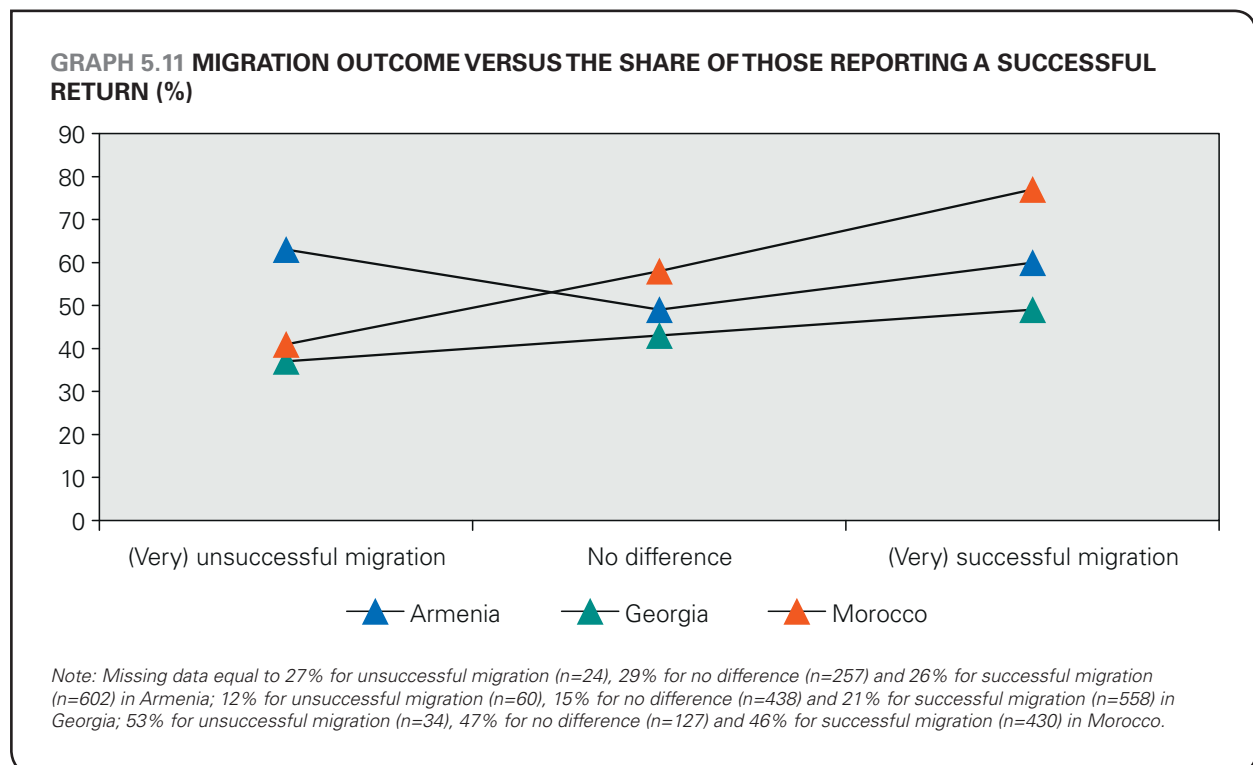
Whether there is a positive correlation between successful migration and successful return is tested in **GRAPH 5.10** by comparing the composite indicators of migration and return outcomes. In the case of Armenia, no clear pattern exists. Around 60% of those who experienced a successful migration also experienced a successful return. A similar share can be found also among those who had an unsuccessful migration experience. Therefore, the benefits acquired or not acquired during the time abroad do not seem to have any impact on migrants' chances upon return. Georgia offers a more distinctive picture. Successful migrations are more likely to lead to 'successful' returns. Among those who experienced successful migration, 49% also reported a successful return compared to only 37% of those who experienced unsuccessful migration (however, the number of cases is too small to draw firm conclusions).

GRAPH 5.10 MIGRATION OUTCOME VERSUS RETURN OUTCOME (%)

		(Very) unsuccessful return	No difference	(Very) successful return
Morocco	Successful migration	5	18	77
	No difference	13	29	58
	Unsuccessful migration	21	38	41
Georgia	Successful migration	7	44	49
	No difference	9	48	43
	Unsuccessful migration	15	48	37
Armenia	Successful migration	1	39	60
	No difference	3	48	49
	Unsuccessful migration	0	38	63

■ (Very) unsuccessful return   ■ No difference   ■ (Very) successful return

Note: Missing data equal to 27% for unsuccessful migration (n=24), 29% for no difference (n=257) and 26% for successful migration (n=602) in Armenia; 12% for unsuccessful migration (n=60), 15% for no difference (n=438) and 21% for successful migration (n=558) in Georgia; 53% for unsuccessful migration (n=34), 47% for no difference (n=127) and 46% for successful migration (n=430) in Morocco.

Although less than 50% of Moroccan returnees responded fully to questions regarding both indicators, those for whom data exists have been particularly successful. Nonetheless, there is still a trend demonstrating a degree of positive correlation between the two indicators. Around 77% of those who experienced successful migration also reported a successful return. This share drops to only 41% of those who experienced unsuccessful migration.

Another graphical representation of the data on migration and return outcomes is shown in **GRAPH 5.11**. It shows the share of respondents with a successful return compared to the success in their migration. A clear and positive pattern can be seen in Morocco and Georgia, where the data suggests that a positive relationship exists between the extent to which migration and return are successful. As already stated, the pattern is not clear in Armenia. This is because the share of those reporting a successful return is fairly similar among both groups of respondents with unsuccessful and successful migrations.

GRAPH 5.11 **MIGRATION OUTCOME VERSUS THE SHARE OF THOSE REPORTING A SUCCESSFUL RETURN (%)**

Note: Missing data equal to 27% for unsuccessful migration (n=24), 29% for no difference (n=257) and 26% for successful migration (n=602) in Armenia; 12% for unsuccessful migration (n=60), 15% for no difference (n=438) and 21% for successful migration (n=558) in Georgia; 53% for unsuccessful migration (n=34), 47% for no difference (n=127) and 46% for successful migration (n=430) in Morocco.

In general, limited gains are observed with respect to the labour market situation upon return in the case of Armenia and Georgia, while in Morocco, returnees clearly perform much better on the labour market than potential migrants do. Yet this also may be triggered by the educational profiles of these groups of migrants, as, in contrast to Armenia and Georgia, returnees in Morocco had a higher level of education than the respondents in the potential migrant dataset.

5.5 DOES MIGRATION IMPROVE THE SOCIO-ECONOMIC CONDITIONS OF MIGRANT HOUSEHOLDS IN A SUSTAINABLE MANNER?

The earlier discussion on the economic benefits of migration established that it is relatively easy to illustrate the aggregate economic benefit of migration to both the country of destination and the country of origin. The difficulty has always been in determining the nature of the benefits that accrue to migrants and their families. For circular migration to be attractive to individuals, it must be seen to have individual benefits. As discussed in Section 4.8, migration improves the economic conditions of returnee households in Morocco, but not in Armenia and Georgia. Similarly, there is a dramatic improvement in social conditions in returnees' households in Morocco, while almost no difference is observed between the social conditions of returnees and those of potential migrants in Armenia and a very small improvement is observed in Georgia.

Data on the size of remittances and savings in **TABLE 5.3** show that in all countries more than two-thirds of migrants regularly sent remittances home and brought back savings with them. The average remittance amount per month reaches EUR 360 in Armenia, EUR 354 in Morocco and EUR 261 in Georgia. The average savings amount, on the other hand, was found to be highest per returnee in Armenia (EUR 2 009). It is lower in Georgia (EUR 1 400). It must be emphasised that respondents during the interviews were not always keen to report their income, including remittances and savings. Young people tend to overestimate and older people tend to underestimate income, while in Morocco many people refused to answer income-related questions, which may be linked to the low level of trust. Therefore, this question was omitted in Morocco.

TABLE 5.3 SIZE OF REMITTANCES AND SAVINGS COMING FROM RETURNEES

Remittances and savings	**Armenia**	**Georgia**	**Morocco**
Share of returnees who sent remittances regularly (%)	76	64	63
Average amount of remittances sent per month (EUR)	360	261	354
Median amount of remittances sent per month (EUR)	287	220	300
Share of returnees who brought back savings (%)	67	67	69
Average amount of savings per returnee (EUR)	2 009	1 400	No data
Median amount of savings per returnee (EUR)	972	667	No data

Note: Missing data on the share of returnees with savings and remittances – less than 2%; data on the average amount of remittances and savings refers only to those having sent or having brought remittances or savings and missing data equal to 23% in the case of remittances (n=1 048) and 35% in the case of savings (n=912) in Armenia; 16% in the case of remittances (n=893) and 26% in the case of savings (n=922) in Georgia; and 12% in the case of remittances (n=875) in Morocco.

It is often assumed that women send remittances in rather different ways than men, sometimes focusing more on smaller, regular sums than larger project-orientated transfers, for example. However, data on the subject is limited. Our data suggests that women sent money significantly less often than men in all countries. This was particularly clear in Armenia where 80% of men reported sending money back compared to only 45% of women. Differences were less pronounced in Georgia and Morocco. Women were more likely to return with savings, though still less likely than men to do so in Armenia and only slightly more in Georgia and Morocco.

Data on the use of remittances and savings reinforces the findings of similar surveys (**TABLE 5.4**). Living expenses, by a very considerable margin, are the most common use of remittances in all three countries. In Armenia and Georgia, more than 95% of recipients spend remittances on living expenses and 89% in Morocco do so. In Armenia and Morocco, a second significant source of expenditure is the purchase of property (15%), which increases the use of savings to 33% in the case of Morocco (19% in the case of Armenia). In Georgia, buying durables (car, computer, home electronics) is the next most significant expenditure after living expenses. This is also quite important in Morocco. The most noteworthy item for Morocco is that 32% of Moroccans invest their savings in some business activity – using 8% of remittances. This may be linked to the long tradition of micro enterprises in a largely informal economy and the lack of opportunities in wage employment.

A particularly interesting aspect of this data that is relevant to the issue of brain drain is the use of both remittances and savings for education. Data from this study provides positive examples of the potential for this aspect of brain gain. Of course, investment in education is still far short of consumption, but it is relatively higher than in comparable surveys, particularly in the case of Morocco and Georgia. Individuals were asked if they had used remittances for the education of their children or for the education of others – it was a simple 'yes' or 'no' question since asking for levels of expenditure would have been too complicated and unreliable.

In Armenia, 9% of respondents reported that they had used remittances for the education of children or of others. In Georgia, this is substantially higher, at 16%, and the use of savings for education is similarly high (13%). Morocco also provides an example of the potential of migration to increase human capital in the country of origin. A total of 21% of respondents reported that part of their remittances to Morocco was spent on education. More than 10% of returnees reported that part of their savings was spent on education. These results partially correct the assumption that remittances are spent primarily on consumption and housing and provide an example of the existence of brain gain.

TABLE 5.4 USE OF REMITTANCES AND SAVINGS AT HOME (%), MULTIPLE ANSWER

Areas spent	Armenia		Georgia		Morocco	
	remittances	savings	remittances	savings	remittances	savings
Living expenses	96	86	97	85	89	64
Buying property	15	19	4	6	16	33
Buying durables	7	10	15	18	14	19
Education of children or of others	9	6	16	13	21	10
Business activity	0	1	0	3	8	32

Note: Data refers only to those having sent or having brought remittances or savings – n=1 048 (remittances) and n=912 (savings) in Armenia; n=893 (remittances) and n=922 (savings) in Georgia; n=875 (remittances) and n=956 (savings) in Morocco; missing data less than 4%.

For a longer-term economic impact analysis of migration, **TABLE 5.5** presents the economic and social conditions of households in three levels (better conditions, average conditions and worse conditions). It compares the situation between another three sub-groups of households: households with no migration history, households with a current migrant abroad and households with returnees. Thus, the potential migrant sample is re-grouped here based on the household experience of migration. The results across all three countries are similar: the least well-off group consists of those households with no connection to migration at all. Returnee households are the next well-off group. In Armenia and Georgia, the wealthiest households are those which currently have a migrant family member abroad. In Morocco, the households with returnees have the best social and economic conditions.

TABLE 5.5 ECONOMIC AND SOCIAL CONDITIONS INDEX BY HOUSEHOLD SUB-GROUP (%)

	Better conditions		Average conditions		Worse conditions	
	economic	social	economic	social	economic	social
Armenia						
Households with no migration history	16	34	68	47	15	19
Households with current migrants abroad	36	27	45	43	20	30
Households of the returnees	21	33	60	45	19	22
Georgia						
Households with no migration history	14	31	69	46	17	23
Households with current migrants abroad	40	45	54	43	6	12
Households of the returnees	20	35	66	45	15	20
Morocco						
Households with no migration history	6	31	62	46	31	23
Households with current migrants abroad	15	47	66	38	19	15
Households of the returnees	17	66	60	28	23	6

Note: Economic conditions index – missing data equal to 20% (returnees), 16% (potential migrants households with no migration history, n=1 230) and 32% (potential migrants households with current migrants abroad, n=159) in Armenia; 20% (returnees), 13% (potential migrants households with no migration history, n=1 207) and 19% (potential migrants households with current migrants abroad, n=194) in Georgia; and 15% (returnees), 24% (potential migrants households with no migration history, n=2 249) and 29% (potential migrants households with current migrants abroad, n=242) in Morocco. Social conditions index – missing data less than 5% except for the group of returnees in Georgia (6%) and potential migrant households in Morocco (22%).

The share of households with better economic conditions is the highest among those with current migrant members abroad in Armenia (36%) and Georgia (40%), while returnee households have better economic conditions in Morocco (15%). The fact that the households of the returnees are not economically better-off in Georgia and Armenia compared to the households with current migrants abroad suggests that a large share of migrants benefit from the immediate impact of migration, mainly through remittances to families, but do not manage to use the migration experience and savings to improve their living standards in a sustainable way upon return. Unfavourable labour market conditions and insufficient support pose significant barriers to returnees using their experiences overseas in ways that translate into greater economic security.

The pattern in the social conditions indicator is not so clear. In Georgia, the households with current migrants abroad have the best social conditions (45%), following the same pattern of economic conditions. The same pattern applies in Morocco in that this indicator matches the economic conditions index – returnee households are very clearly in the best position, with 66% of them enjoying a high level of benefits measured by this index. In Armenia, however, there is a higher share of households with no migration history which have better conditions compared to the other two groups. High levels on the social conditions indicator increase with time abroad for the Moroccan contingent, so this explains part of this variation. Increasing the size and quality of housing is something that is typically prioritised in remittance expenditure and the advantageous position of returnees may be a result of such priorities.

5.6 CAN MIGRANT SUPPORT MEASURES BEFORE DEPARTURE AND AFTER RETURN LEAD TO MORE SUCCESSFUL MIGRATION OUTCOMES?

The assumption that migrant support measures can play a positive role is not necessarily undermined by the observation that at present they do not play that role. Asked about their awareness and use of official schemes to migrate, potential migrants were only marginally more aware of these schemes to support migration than returnees (**GRAPH 5.12**). Only 6% of Armenians, 8% of Georgians and 11% of Moroccans knew of some schemes to facilitate working overseas before migration. Among those who knew about support measures, government services attracted the most attention, and only 3% of Armenian potential migrants, 5% of Georgians and 6% of Moroccans used such schemes.


GRAPH 5.12 **RETURNEES' AWARENESS AND USE OF OFFICIAL SCHEMES TO MIGRATE (%)**
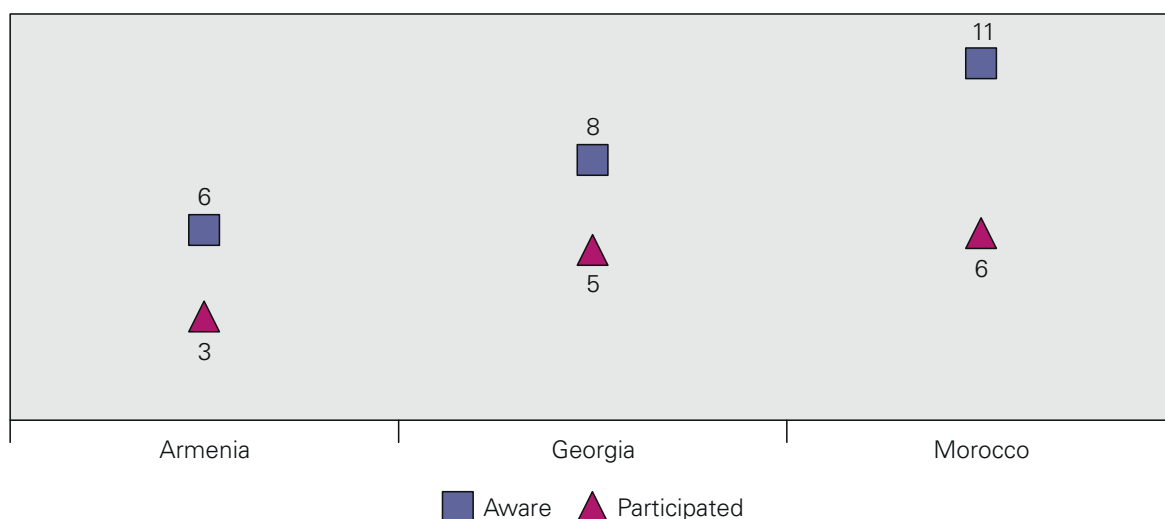
In the case of return schemes, the vast majority of returnees in all three countries had no knowledge of their existence at all (**GRAPH 5.13**). Only 1% of Armenian returnees, 2% of Georgian returnees and 7% of Moroccan returnees even knew of return schemes. An even smaller proportion of individuals were able to benefit from such schemes: no one at all in Armenia, a single individual in Georgia and a more respectable 40 people or 41% of those who were aware of them in Morocco.

GRAPH 5.13 RETURNEES' AWARENESS AND USE OF RETURN SCHEMES (%)

Note: Missing data less than 1%.
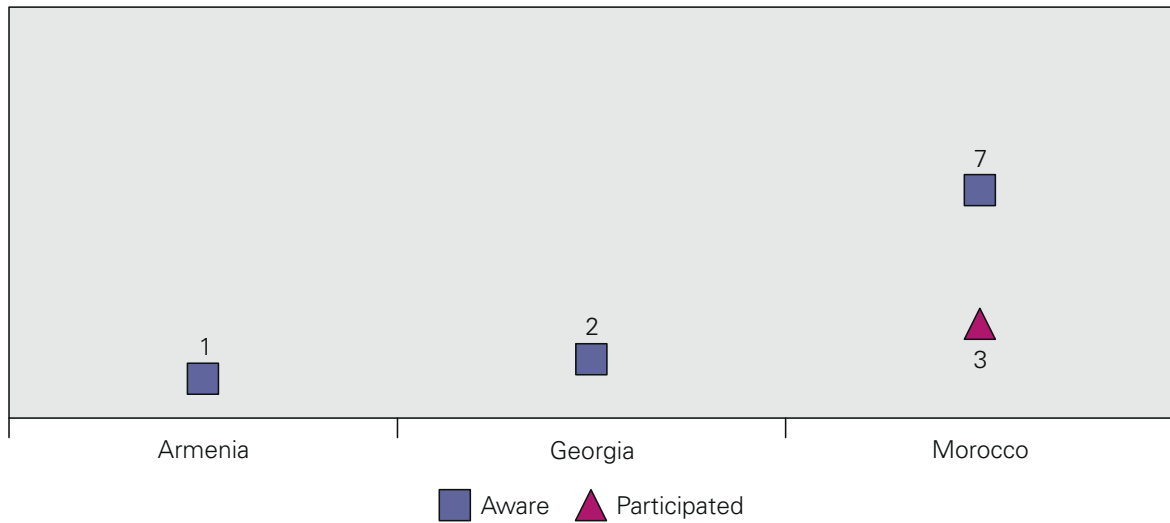
Similarly, **GRAPH 5.14** shows that only a few returnees actually attended any pre-departure training before moving abroad: 2% in Armenia, 6% in Georgia and 16% in Morocco. Among potential migrants, however, interest in pre-departure training is much higher: 30% of potential migrants in Armenia, 40% in Georgia and 41% in Morocco would like to undertake such training if available before moving abroad. However, there is a big difference between genders with regard to interest in training. Only 23% of Armenian men report serious intentions to participate in any training before moving abroad, though this rises significantly to 39% for Armenian women. Georgian women are also substantially more likely to plan to participate in training before leaving – 42% compared to 38% of men. The gender difference in Morocco is smaller: 41% of men think it likely that they will participate in training compared to 43% of women.

GRAPH 5.14 USE OF PRE-DEPARTURE TRAINING AMONG RETURNEES AND POTENTIAL MIGRANTS (%)
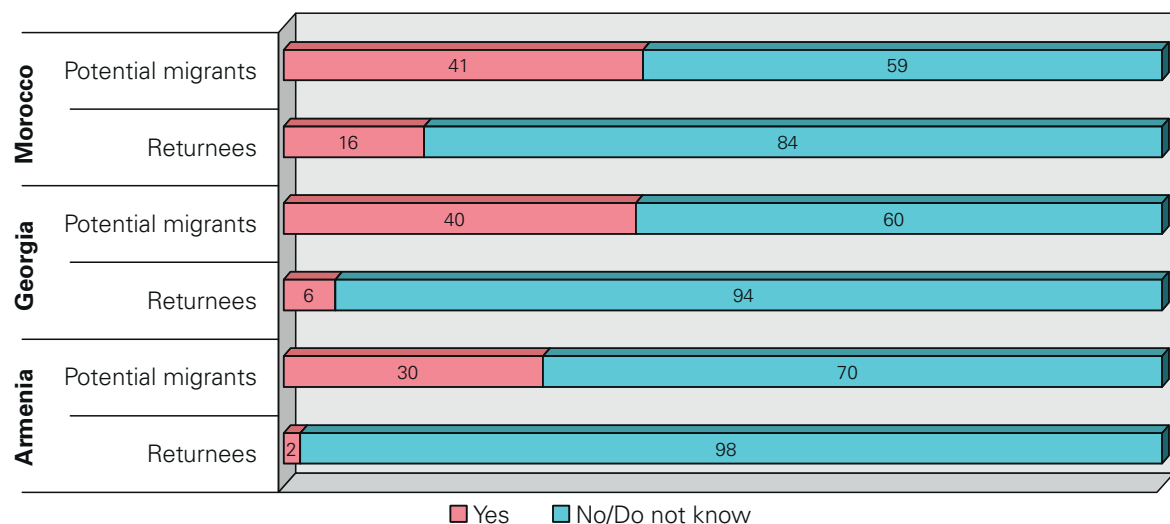
Note: No missing data except for the group of potential migrants in Morocco (5%); data for potential migrants refers only to those who intend to migrate, excluding respondents who were counted as both potential and returning migrants and for whom the return migrant questionnaire was used (n=872 in Armenia, n=710 in Georgia and n=1 086 in Morocco).

In all three countries, the most significant motivation to participate in this training is purely to acquire new skills. The relatively small number of Armenian migrants who declared an interest in training was particularly focused on language training (55%) to the exclusion of most other training subjects. This was also the case in Georgia where 64% declared an interest in language training. In Morocco, 44% reported they would take language courses followed by 41% who wanted to take a vocational course. There were virtually no gender differences in this information.
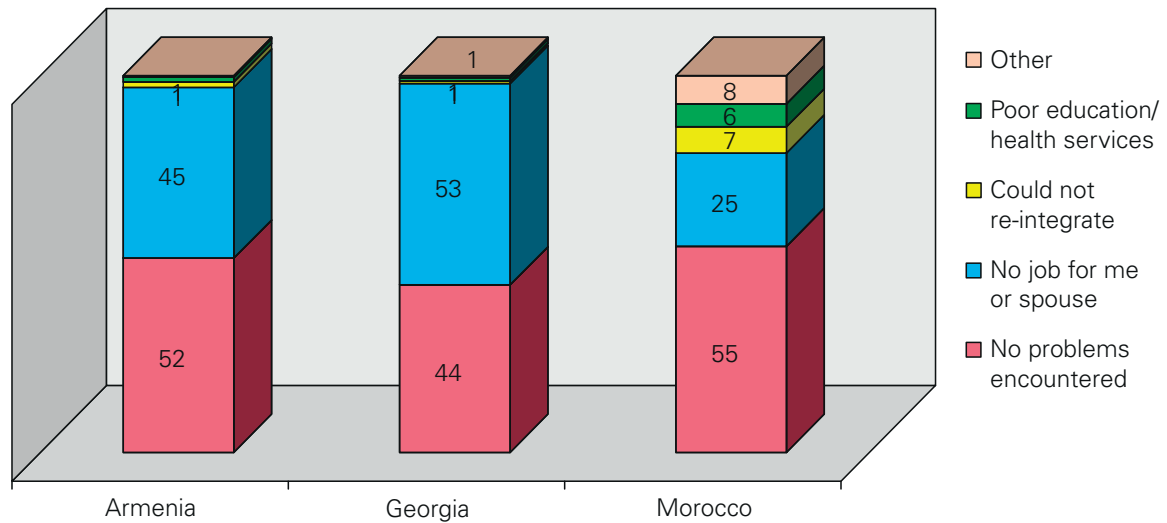
Potential migrants and returnees were also asked about the most important support they would need for moving and working abroad. **GRAPH 5.15** indicates that the vast majority of both potential migrants and returnees in all countries thought that 'support to find a job abroad' is the most important help required to facilitate migration. The importance attached to job finding varies slightly between countries, with around three-quarters of respondents in Armenia and Georgia and two-thirds of respondents in Morocco considering it the most important support. Support for the journey and finding accommodation abroad was rated as the second most important category by Moroccans (13% of potential migrants and 18% of returnees). It was rated by between 7% and 11% of Armenians and Georgians as the second most important support. Another important category requested by respondents was help with the formalities of migration in both the home and destination countries (13% in Armenia, 12% in Morocco and 11% in Georgia). It is important to emphasise that other categories of support (e.g. language courses, training, skills recognition) were only of interest to a few individuals.

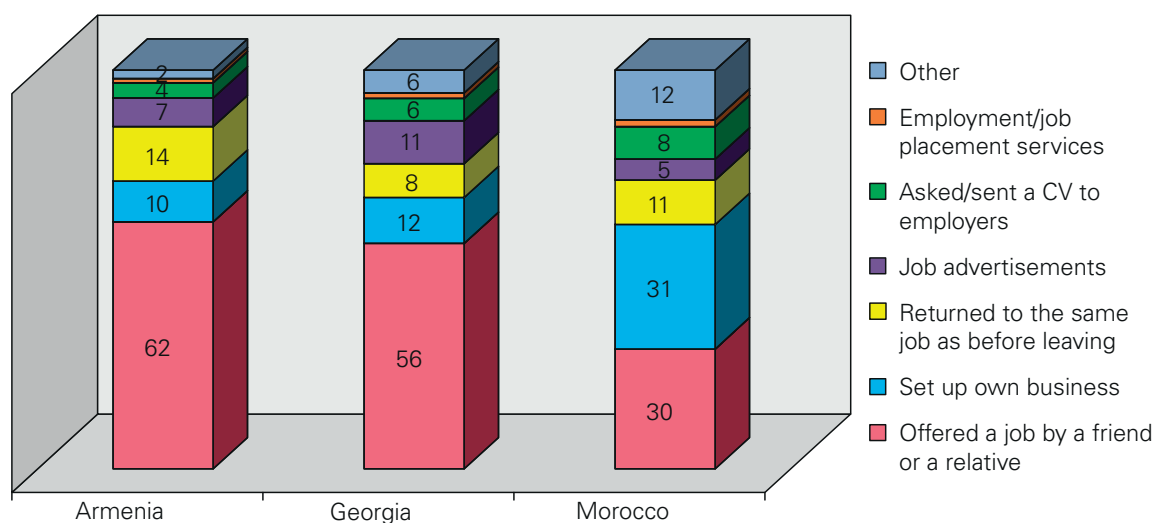GRAPH 5.15 **MOST IMPORTANT SUPPORT NEEDED FOR MOVING AND WORKING ABROAD (%)**
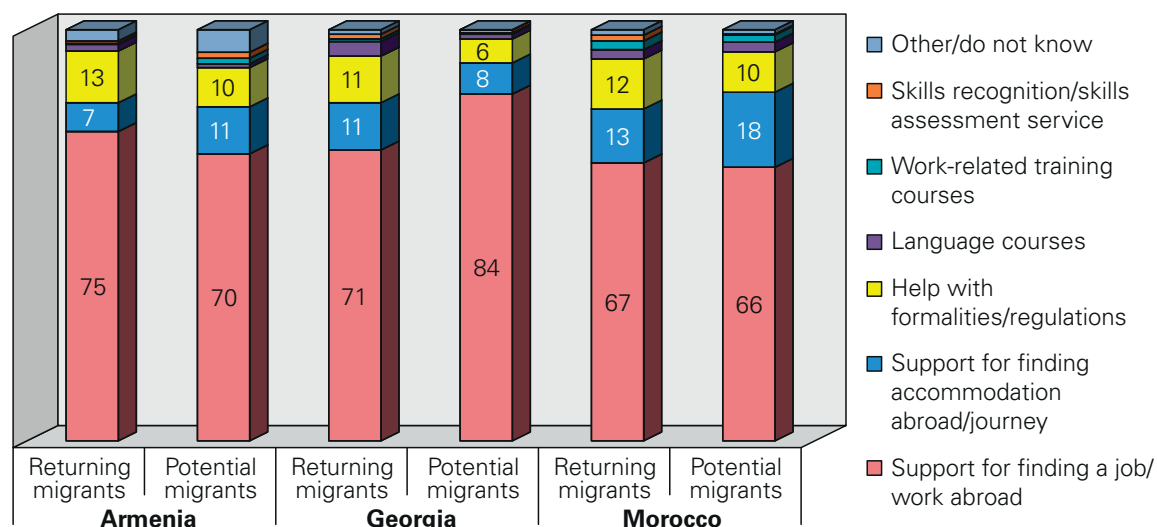
Note: Missing data less than 2%; data for potential migrants refers only to those who intend to migrate, excluding respondents who were counted as both potential and returning migrants and for whom the return migrant questionnaire was used (n=872 in Armenia, n=710 in Georgia and n=1 086 in Morocco).

Returnees were also asked about the biggest problems they encountered upon return (**GRAPH 5.16**). More than half of returnees in Morocco (55%) and Armenia (52%) reported facing no problems at home. The figure was less than half in Georgia (44%). Of those who had experienced problems, difficulties in finding a job outweighed all other issues: a lack of jobs for themselves or for spouses is the single most important problem for 53% of returnees in Georgia and 45% of returnees in Armenia. All other issues were only mentioned by very few people. Job finding is considered important also in Morocco but to a lesser degree (25%). Some other issues were reported more by Moroccan returnees, such as the difficulty of reintegrating (7%), which may reflect the much longer periods of time Moroccan migrants had spent abroad, and poor education and health services at home (6%, both for them and their children).

GRAPH 5.16 BIGGEST PROBLEMS ENCOUNTERED BY RETURNEES AT HOME (%)

Legend:
- Other
- Poor education/health services
- Could not re-integrate
- No job for me or spouse
- No problems encountered

Armenia: 52, 45, 1
Georgia: 44, 53, 1
Morocco: 55, 25, 7, 6, 8

Note: Missing data less than 5%.

Given that it is a main concern for many, the returnees who were working were also asked how they found their job upon return. As seen in **GRAPH 5.17**, 62% of returnees in Armenia and 56% of returnees in Georgia found a job with the help of a friend or family relative, proving the significance of social networks in finding jobs. Interestingly, this way of finding a job is still important but less frequent in Morocco (30%), because 'setting up own business' is a more widely used strategy by many more people (31%). This is quite an impressive impact of migration, encouraging much-needed entrepreneurship in the country. 'Returning to the same job before migration' was also rated quite highly, indicating the temporary nature of the migration duration (14% in Armenia, 11% in Morocco, 8% in Georgia). Finally, 'applying to job advertisements' (11% in Georgia, 7% in Armenia), and 'asking/sending CV directly to employers' (8% in Morocco, 6% in Georgia) were other ways of finding jobs. Note the very tiny share of employment services used, rated by only a few people.

GRAPH 5.17 HOW DID YOU FIND WORK UPON RETURN? (%)

Legend:
- Other
- Employment/job placement services
- Asked/sent a CV to employers
- Job advertisements
- Returned to the same job as before leaving
- Set up own business
- Offered a job by a friend or a relative

Armenia: 62, 10, 14, 7, 4, 2
Georgia: 56, 12, 8, 11, 6, 6
Morocco: 30, 31, 11, 5, 8, 12

Note: Data refers only to those who found work upon return (n=580 in Armenia, n=416 in Georgia and n=844 in Morocco); missing data less than 4%.

It must be remembered that the most widely used strategy for finding a job abroad was through help from family members and/or friends or acquaintances who were resident abroad. As discussed in Section 4.7, this strategy was used by three-quarters of both returnees and potential migrants. Help from family members and/or friends or acquaintances who were in the home country was the second-best strategy, followed by a much smaller use of employment (job placement) services (public and private), both at home and abroad.

The above analysis suggests a strong need for policy measures to support migrants before departure, in order to prepare them with training and secure a more efficient job and skills-matching process, and upon return, in order to facilitate their labour market reintegration and/or enable them to start up a business. As confirmed by the experiences and replies, employment and job placement services are the most important support needed by the migrants, whether they are moving abroad or returning back home.

6. POLICY CONCLUSIONS AND RECOMMENDATIONS

The ETF surveys in Armenia, Georgia and Morocco focused on the dynamics between migration and human capital. The data provided new information on the education, skill and employment profiles of both potential migrants and returnees. Linked to the education levels of migrants, questions were raised about whether the migrants' qualifications were used while working abroad; whether new skills and qualifications were acquired during the stay abroad; and to what extent the new skills and qualifications of returnees are used in the domestic economy and labour market. This information is used to understand the interaction between human capital and migration and to identify some general trends linked to brain drain, brain gain, brain waste and brain circulation in the three countries. Below is a short summary of the survey findings with some policy implications.

6.1 MAIN FINDINGS

Migration is an attractive idea to many people, particularly young men with relatively fewer family links at home, but the realities and patterns of migration vary in the three countries.

Migration is attractive to a relatively high number of people, particularly in Morocco, but only around 10% of the population is able and ready to leave in each country. This reflects the attractiveness of migration as an idea but the limited access to legal migration opportunities. The profile of a typical migrant is a young man in his 20s, with a primary (Morocco) or secondary (Armenia and Georgia) education level and with fewer family links at home (single and without children). The share of female potential migrants is not that low (around 40%). However, there are very few women returnees in Armenia and Morocco, indicating the dominance of male migration in the two countries, while Georgia displays more feminised flows. The median time per migration is less than a year in Armenia, less than two years in Georgia and six years in Morocco. Close to half of returnees in Armenia and one-quarter of returnees in Georgia migrated more than once, indicating a higher circularity of movements, while in Morocco most of the returnees migrated only once.

Although the main reason for migration is overwhelmingly economic, a sizeable minority migrates for education and training purposes, particularly in Morocco. Return is typically related to family issues.

In all countries, the main reasons for migration are overwhelmingly economic (no job, low wages, poor career prospects and a low standard of living). In Morocco, quite a number of returnees migrated primarily for education reasons and a sizeable minority of respondents migrated because they were dissatisfied living in the country. Having used the same definitions and sampling methods in all three countries, the Moroccan case implies a higher share of 'international student flows' than in Georgia and Armenia. This can be considered positive for Morocco as migration is used to increase one's human capital and transfer of international knowledge (in addition to gaining work experience). However, this may also imply that a higher value is placed on education gained abroad in Moroccan society and in the labour market and/or that there are more limited opportunities for quality education at home. The trajectory of these international students and the possible impact on the national higher education system should be monitored, and graduates of foreign universities must be encouraged to return and take up 'productive' jobs at home. The main reasons for return are mostly linked to family issues for the majority of returnees, but economic factors (termination of work contracts, unemployment and low income abroad, expiration of work or residence permit) were not insignificant.

By and large, the education and skill levels of migrants reflect the overall education levels of populations, but interest in migration increases from primary to secondary education in all three countries.

The education and skill levels of migrants reflect the general education of populations and the structure of education systems in their countries of origin. For example, higher shares of migrants from Armenia and Georgia have a medium level of vocational and higher education, while the share of migrants with vocational and higher education is very small in Morocco. The low education level of the Moroccan population and the higher education level in Armenia and Georgia lead to slightly different interaction between education and the intention to migrate. There is a strong tendency for a large proportion of completely uneducated individuals in Morocco to prefer to remain in the country. This suggests an 'education hump' (similar to the famous 'migration hump' identified by Phillip Martin), whereby migration is unlikely at very low levels of education. Interest in migration then gradually increases from primary to secondary education until it starts to fall again among individuals with higher education. Thus, individuals

with primary and secondary education are the most likely potential migrants in all three countries, but this group forms the 'lowest-educated' category in Armenia and Georgia, while they are in the 'medium-educated' category in Morocco due to the sizeable share of people who are illiterate or who have had no schooling.

In all countries, higher education levels reduce the intention to migrate but, at the same time, increase the opportunity to migrate. This is more complicated in the case of Morocco, where the overall education level is low and graduate unemployment is high, so the pattern is less obvious. Indeed, Moroccan returnees seem to be the best-educated group overall, even before migration. This suggests a small degree of self-selectivity towards educated individuals in the past, at least among those who returned. Another possible explanation is the higher premium placed on education acquired abroad within the Moroccan labour market context, also indicated by the high success rate of return among those with a higher level of education. A better knowledge of education and training systems in sending countries will help to better understand the expected skill profiles of migrant flows.

Unemployment increases the likelihood of migration in all countries, particularly for men, although having a job facilitates rather than prevents migration, especially in Morocco.

Employment levels are low in all three countries – albeit with variations. However, potential migrants are least likely to be employed in Armenia and Georgia, indicating that migration is highly sensitive to unemployment. In Morocco, on the other hand, a higher share of potential migrants work compared to non-migrants, so the intention to migrate is higher among those who are already active and currently employed. This is linked to the specificity of non-migrants who are more likely women with a low level of (or no) education in Morocco. In all three countries, potential migrants are more represented not only among the unemployed but also among casual workers and the self-employed. Unemployment is an obvious factor in prompting men to migrate in all countries, while women's intention to migrate is not sensitive to unemployment.

In all countries, the migration experience seems to increase activity and employment rates upon return. The increase is particularly significant for women. Morocco shows the biggest change, with two-thirds of returnees employed compared to less than half of non-migrants. This indicates that migration encourages labour market activity and provides better opportunities for employment upon return. Signs of skill acquisition (personal and technical) during migration periods appear to be a valuable bonus for the labour market of a country characterised by very high inactivity rates and low education levels of labour force. Given the significant employment challenges, labour market management and reforms, job creation and active employment policies to support labour market integration must be an essential part of migration policies for both governments and donors.

Despite common destinations in Europe and Russia, the best and the brightest from all countries tend to prefer the USA and Canada as their main destinations, while some EU countries are also attractive for better-educated migrants from Armenia and Georgia.

Europe is a typical destination for Morocco, Russia is a typical destination for Armenia and Georgians show a preference for Turkey, Russia and Greece. In general, diaspora links and liberal visa policies in destination countries seem to shape and facilitate migration outflows. However, in both Armenia and Georgia, highly educated migrants prefer to migrate to the USA, Canada and five EU destinations (France, Germany, the UK, Spain and Italy). Females, who are generally better educated than men, have a much higher preference for these destinations, while male migrants mostly travel to Russia. Migrants in Russia largely have a medium level of education, although a considerable number are highly educated.

Despite the general attractiveness of Europe and very small numbers of highly educated individuals, the preferred destinations of highly skilled Moroccans are also the USA and Canada. In contrast to the two other countries, Moroccan migrant flows are dominated by migrants with a low level of education in Europe, particularly in Spain and Italy. EU countries are relatively less attractive to the highly skilled. France is also the main or most likely destination for many migrants with a low or medium level of education, although a relatively high share of more highly educated migrants returned from France, indicating an international student flow and a certain degree of brain circulation. This may be explained by a higher number of Moroccans who migrated for education purposes. France (and to a lesser extent the UK) seems to be a natural preference for post-graduate studies for Moroccans.

Work experience abroad by returnees indicates the limited types of jobs that are available only in certain sectors and the relatively limited use of education and skills at work, especially by the Georgian and Armenian migrants.

Construction, domestic and personal services, commerce, transport, manufacturing, agriculture and hospitality are the most common sectors of work abroad in all countries. The most widely used strategy for finding a job abroad is through help from family, friends or acquaintances who are resident abroad. Most migrants from Georgia and Armenia worked abroad as skilled or unskilled workers, irrespective of their education level. This led to a high level of skills mismatch for migrants from the two countries, and brain waste given their relatively high education levels.

Although the low quality and labour market relevance of education may be one factor explaining this outcome, the main drive seems to be the nature of labour demand in the destination countries. In the case of Morocco, there is a better match between the education level and job type performed, mainly due to the overall lower levels of education, longer stays abroad and larger migrant networks (diaspora) facilitating a better match.

The perception of working below one's education level is particularly high in Georgia and it increases dramatically among the more highly educated and women, who generally have a higher education level. Georgian female migrants appear to be the most disadvantaged in performing jobs below their education level. This can be explained by higher education levels, a higher share of female migrant workers in domestic services, diverse destinations with few migrant networks abroad and a relatively recent migration history. There is a need for better-managed migration systems that can create more (legal) opportunities for potential migrants. More in-depth knowledge of the education and skills of migrants and the labour market needs of destination countries could help to develop mechanisms that better match the skills of migrants with job requirements abroad. Consequently, this could increase the use of migrants' education and skills abroad.

Migration is an individual project which largely ends with successful outcomes, but return outcomes are found to be less successful in Georgia and Armenia, also demonstrated by the similar economic and social conditions after return.

The migration experience abroad is largely considered successful in all three countries (Morocco, Armenia and Georgia in order of significance), which explains the continuous and sustained migration flows. Return outcomes were found to be much less successful in Georgia (less than half) and Armenia (a bit more than half). Indeed, many returnees experienced no impact on their lives upon return (close to half), which is linked mainly to the high unemployment rate upon return. Return was much more successful for the Moroccan migrants, which may be linked to the relatively more regular nature of migration, longer duration, the EU as the main destination and large migrant networks. Indeed, the economic and social conditions in returnee households were much better than in the households of the other groups in Morocco, reflecting the positive impact of migration after return. On the other hand, virtually no difference was observed between the economic and social conditions of returnees and those of potential migrants in Armenia and Georgia, reflecting the lack of improvement and unsustainability of migration benefits upon return.

Migration leads to a modest brain gain, particularly in Morocco where education levels are low, while the recognition of qualifications acquired abroad is not a common practice except in the case of higher education qualifications.

Migration is seen as a way to enhance skills and qualifications by the majority of people. Although the share of migrants who receive a formal type of education and training is low in Armenia and Georgia, almost a third of Moroccan returnees reported to receive some kind of education or training abroad. Language training, vocational training, workplace training and (post) graduate courses are the most common types. Recognition of qualifications abroad is not a common practice (a third of returnees in Georgia and Morocco, much lower in Armenia), though a higher interest was expressed for it by potential migrants. However, the practice of recognition is primarily used by the higher-educated migrants – more than two-third of the Moroccan high-educated returnees benefited from it – and it is difficult to access it for those with medium (and VET) education levels. More information should be made available on the mechanisms for the recognition of qualifications abroad and potential migrants must be made aware of its importance. However, for the recognition to be possible, it requires also a better transparency and quality of qualifications provided by the education system of the sending countries and cooperation with the European receiving countries for developing systems of recognition. This could further facilitate better opportunities for the migrants on the foreign labour markets and increase the matching of their skills/education and types/levels of jobs done abroad.

The migration experience increases activity and employment levels upon return, most visible for women and in Morocco. The tendency for entrepreneurship significantly increases in Morocco, while labour market reintegration after return remains limited in Armenia and Georgia.

In all countries, returnees have the highest activity and employment rates, indicating the positive impact of the migration experience. The most dramatic increase occurs for female returnees in Morocco. This demonstrates the clear premium that is placed on migration (and education acquired abroad), especially in the Moroccan labour market context. This is possibly linked also to a more entrepreneurial attitude among returnees in an environment largely dominated by traditional and informal micro enterprises. Indeed, the share of employers doubles among Moroccan returnees, indicating the positive impact of migration on entrepreneurship and job creation. Only between one-third in Georgia and less than half of returnees in Armenia are employed upon return, although this is similar or even better than the employment rate of other groups. Low employment is possibly linked to the poor labour market conditions at home and the type of migration (shorter and more repetitive) and lower levels of entrepreneurial attitude as a result of the Soviet heritage.

The gains with respect to the acquisition of new skills and experiences, the use of existing skills on the foreign labour market as well as education and the recognition of qualifications acquired abroad are far lower and limited in the two countries. This suggests that, despite the immediate gains related mainly to remittances, migrants are less successful in turning their experience into a sustained improvement in their living standards upon return. On the contrary, migration can have a negative impact on their chances on the labour market at home. This may be due to a number of reasons: a deterioration of the qualifications that they previously acquired at home; decreased knowledge about local conditions and labour market needs; and limited social networks. Returnees need more systematic support for their labour market reintegration at home, and services should be made available, particularly for job placement and entrepreneurship.

6.2 RESULTS OF ANALYSIS ON THE RESEARCH QUESTIONS

Does seasonal, temporary or circular migration bring more benefits to migrants?

Comparing migration outcome with the period of time spent abroad indicates that the longer the stay, the more successful migration is in Georgia and Morocco. Yet this does not hold for Armenia, where successful migration seems to be independent of the length of stay. Indeed, relatively shorter and circulatory movements typical in Armenia seem to lead to successful migration outcomes, while the data from Morocco and Georgia does not provide support for the benefits of shorter migration periods. This may be linked to the status of migrants in the destination country. Moroccans have better access to long-term residency and citizenship due to longer migration periods. Visa-free entry and short-term permits are the most common for Armenians, but less so for Georgians. Furthermore, while they are very few in number, those migrants who were able to transfer their pension rights had more successful returns (more so in Morocco). Thus, portability of pension rights increases the benefits of migration and return significantly.

Does the education level increase the benefits of the migration experience?

Higher education generally leads to more benefits of migration if there is sufficient correspondence between the education level and the work performed abroad. However, the relationship between education level and migration outcomes is not always straightforward. Contrary to conventional wisdom, the migrants with a low level of education benefited most in Armenia and Georgia. This is related mainly to the limited matching (or mismatch) between the education level of returnees and the low-level jobs that they have performed abroad, which is problematic for highly educated migrants. On the other hand, the more highly educated migrants were the most successful in Morocco, both in terms of migration and return outcomes. Nonetheless, in all countries, migrants with higher education are able to use their experience upon return and make their return more successful.

Does migration lead to any brain gain?

People believe that migration could enhance their qualifications and skills, although a minority of migrants from Armenia and Georgia received formal education or training abroad. Morocco presents a more positive picture as almost one-third of migrants attended some kind of training abroad. Moreover, a significant share of returnees informally gained new skills and experiences abroad, especially in Morocco and Armenia. Such skills include mainly vocational and technical skills, language skills, work organisation skills and ethics. Migration therefore leads to a modest brain gain in many subtle ways, particularly in Morocco where education levels are low. However, most of these new skills are never certified or truly visible in the domestic labour market when migrants return. Thus, there is a need to develop mechanisms to validate such skills, so that returnees can use their migration experience as an additional advantage when searching for a job.

Does work experience abroad improve the labour market chances of returnees at home?

The migration experience itself activates people and increases employment levels upon return in all countries, especially for women. Indeed, returnees have similar or higher activity and employment levels than other groups in all countries, with the most dramatic difference evident in Morocco. Thus, the labour market places a premium on the migration experience (and on education acquired abroad in the Moroccan labour market context). Having said that, work after return is not common in Armenia and Georgia, suggesting little or no improvement in labour market reintegration. The particular success seen in Morocco is also linked to higher levels of entrepreneurial attitude among returnees in an environment largely dominated by traditional and informal micro enterprises. Indeed, the share of employers doubles among the Moroccan returnees, indicating the positive impact of migration on entrepreneurship and job creation. And a large proportion of migrants who work after return use the skills that they have gained abroad in their daily work and find their experiences useful for obtaining work. This is most evident in Morocco. Overall, successful migrations are more likely to lead to successful returns in all countries.

Does migration improve the socio-economic conditions of migrant households in a sustainable manner?

The economic and social conditions in returnee households are better than in the households of other groups in Morocco, but this is not the case in Armenia and Georgia. Indeed, households with current migrants abroad are better off than households with returnees or no current migrants in these two countries. The fact that households with returnees are worse off than households with migrants currently abroad in Georgia and Armenia suggests that a large share of migrants benefit from the immediate impacts of migration, i.e. in the form of remittances received. Indeed, more than two-thirds of migrants send remittances and return to their home country with savings that prove the immediate economic benefits of migration in all countries. At the same time, returnees are not able to use the experiences that they have gained abroad to improve their living standards upon return. The opposite holds for the Moroccan returnees, who seem to perform much better than other households with or without household members currently abroad.

Most remittances or savings are used to cover living expenses, which explains the better economic conditions of households with current migrant household members abroad. A limited share of respondents used these resources for the purposes of education and/or for starting a business activity. The use of remittances for education seems to be particularly important in Morocco and Georgia, which is found to be higher than the international average in other countries. Moreover, one-third of savings in Morocco were invested in a business activity. This indicates a strong positive impact of migration on entrepreneurship in Morocco, which can also be seen in the high share of returnees working as employers or becoming self-employed upon return. The importance of savings to start a business should be recognised by the governments and more mechanisms and information on the different schemes should be made available to support returnees so that they can achieve more successful business start-ups.

Can migrant support measures before departure and after return lead to more successful migration outcomes?

A very small share of migrants knew about support measures for migration abroad. Even a lower share of them made use of such schemes. Instead they relied mostly on the help of their families and acquaintances abroad or at home. The same picture can be seen in the case of the awareness and use of return schemes, with little evidence of effective programmes that systematically place or insert returnees successfully in the labour market. Moreover, only a small share of returnees participated in pre-departure training, although the intention to attend such training is much higher among potential migrants, with the main focus being on language and vocational courses. Support for finding a job is the most important help needed, both before migration and upon return to the home country. The results suggest a strong need for policy measures to support migrants before departure, in order to prepare them with training and help them secure a more efficient job and skills-matching process, and upon return, in order to facilitate their labour market reintegration and/or enable them to start up a business. As confirmed by the experiences and replies, the employment and job placement services are the most important support needed by migrants, whether they are moving abroad or returning back home.

6.3 POLICY CONCLUSIONS AND RECOMMENDATIONS

Overall, the above discussion indicates that migration was more likely to be a success story in Morocco than in the other two countries. The longer migration history in Morocco, with a relatively more regular nature and longer migration periods mainly to EU destinations, and larger migrant networks (diaspora) abroad seem to reduce the costs of migration and increase the benefits. Moreover, there is a relatively better match between the education level and the type of job performed abroad, mainly due to the overall lower education levels of Moroccan migrants. Thus, the low starting levels of migrants in terms of education and skills and the limited number of highly educated migrants seem to contribute to the higher success rates in Morocco.

In contrast, Armenia and Georgia have a recent migration history. Migration periods are much shorter and the migration experience is more irregular. Migrants travel to more diversified destinations (Russia being the main one) and have fewer migrant networks in those destinations. In spite of or because of the overall higher education levels of migrants, the match between their education levels and jobs performed abroad was quite low in the two countries, particularly in Georgia. The fact that Georgia has the lowest success rate in this regard can be further explained by the higher share of female migrant workers who generally had a higher level of education but worked mostly in low-paid sectors abroad (i.e. domestic work). Educated women migrants who emigrate for work reasons seem to be the most disadvantaged group.

In terms of policy implications, these findings suggest the need for a greater emphasis on the employment and skills dimension of migration to achieve better migration and return outcomes. There is a need for policy measures to support migrants before departure, in order to ensure a more efficient job and skills-matching process, and upon return, in order to facilitate their labour market reintegration and support them in their entrepreneurial activities. Other policy measures related to education and skills would be to develop mechanisms to validate the new skills and experiences acquired abroad by migrants, which could be used as an advantage in the domestic labour market upon return, and to give more attention to the recognition mechanisms for qualifications acquired abroad, not only for the more highly educated but also for those with medium (and VET) education levels. They should ensure that migrants' skills are utilised effectively in the receiving country and when they return home. In this regard, the following recommendations are proposed.

■ Improving the quality of education and training systems could help to produce high-quality skilled labour that can compete both in domestic and global labour markets. This is particularly the case for Morocco, where destination countries could invest more to improve the coverage and quality of education and training. Migration must be an integral part of the national education and training policies in sending countries, though the training of migrants should not be the only objective of any education system.

■ Given the significant employment challenges experienced in sending countries and given that migration is highly sensitive to unemployment, labour market management and reforms, job creation and active employment policies to support labour market integration must be an essential part of migration policies for both the governments of sending countries and donors.

■ More instruments are needed to match migrants' skills with labour market needs abroad. Such instruments include bilateral agreements, cross-national placement services (e.g. extending EURES, the European job mobility portal), sharing databases and websites where job-seekers and employers meet, skills assessment and certification systems. Better information about available job vacancies abroad and the skills of potential migrants help reduce the skills mismatch and brain waste in destination countries, which is particularly the case in Georgia and to a lesser extent in Armenia.

■ Returnees need to be helped to use their skills more effectively upon their return and the proportion of remittances and migrants' savings used for education and entrepreneurial activity needs to be increased. Relevant instruments include: the validation of prior learning abroad; improved and tailored placement services for migrants; and support for entrepreneurs and business start-ups, including incentives for turning savings into entrepreneurial opportunity. Although returnees show a high ability to create small and medium-sized businesses, especially in Morocco, there are still many hurdles that returnees face when setting up businesses.

■ An open and accessible system for the recognition and validation of migrants' skills and qualifications in destination countries is needed to improve the match between jobs and the skills of migrants. This is especially important for women. Qualification recognition systems are gradually being put in place in EU Member States, but are largely lacking in the Commonwealth of Independent States.

■ Pre-departure training should be made more readily available, with a focus on appropriate language training, vocational qualifications and information about available institutional pathways for finding employment abroad (e.g. employment offices).

■ Facilitating circular migration, whereby migrants are allowed to move back and forth between host and home countries without losing their rights, could be encouraged by receiving countries. Circular movements with easy access to economic sectors where migrants are needed seem to work well in the case of Armenia. In the meantime, countries of origin should be active in developing policies that attract migrants back, even if temporarily. Highlighting the benefits of return migration is also crucial and needs to be supported by return schemes and the portability of social benefits.

■ The EU mobility tools could inspire the reform of education and training systems and labour markets, in particular: the standards of the Bologna and Copenhagen processes, the European Qualifications Framework, the EU 2020 Strategy, the mechanisms for the recognition of qualifications, the validation of prior learning, and the transparency and quality assurance tools. Using these tools could enhance the transparency and portability of qualifications.

ABBREVIATIONS AND ACRONYMS

ETF	European Training Foundation
EU	European Union
EUR	Euro
GAMM	Global Approach to Migration and Mobility
GDP	Gross domestic product
ICT	Information and communication technology
ISCED	International Standard Classification of Education
MAD	Moroccan dirham
UK	United Kingdom
USA	United States of America
USSR	Union of Soviet Socialist Republics
VET	Vocational education and training

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