STUDY OF LABOUR MIGRATION DYNAMICS IN THE CENTRAL ASIA – RUSSIAN FEDERATION MIGRATION CORRIDOR

CONSOLIDATED REPORT

2021

Schweizerische Eidgenossenschaft
Confédération suisse
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Swiss Agency for Development and Cooperation SDC

IOM UN MIGRATION

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ACRONYMS

ADB	Asian Development Bank
AELM	Agencies for External Labour Migration
CABAR	Central Asian Bureau for Analytical Reporting
CDLR	Centre for the Development of Labour Resources
CEO	Chief Executive Officer
CIS	Commonwealth of Independent States
CIS STAT	Interstate Statistical Committee of the Commonwealth of Independent States
COVID-19	Coronavirus disease
CV	Curriculum vitae
EADB	East African Development Bank
EEU	Eurasian Economic Union
ELX	Electronic Labour Exchange
EU	European Union
FGD	Focus - group discussions
FGDKR	Focus-group discussions in Kyrgyzstan
FGDRT	Focus-group discussions in Tajikistan
FGD RUZ	Focus-group discussions in Uzbekistan
GBAO	Gorno-Badakhshan Autonomous Region
GDP	Gross domestic product
GRP	Gross rating point
HIV	Human immunodeficiency virus
HR	Human resources
ICC	Information and Consultation Centre
ICT	Information and communication technology
ID	Identity document
ILO	International Labour Organization
IOM	International Organization for Migration
IT	Information Technology
LLC	Limited Liability Company
Minstroy	The Russian Ministry of Construction, Housing and Utilities
NGO	Non-governmental organization
OECD	Organization for Economic Co-operation and Development
PCR – test	Polymerase chain reaction test for Coronavirus disease
PJSC	Public Joint Stock Company
Rosstat	Federal State Statistics Service
Rostrud	Federal Service for Labour and Employment
PRA	Private Recruitment Agencies
PVTC	Private Vocational Training Centre
RUB	Roubles
SDC	Swiss Agency for Development and Cooperation
SME	Small and medium business
SPSS	Statistical Package for Social Science
SRA	State Recruitment Agencies
SVTC	State-funded Vocational Training Centre
TB	Tuberculosis
UAE	The United Arab Emirates
UCA	University of Central Asia
UN	United Nations
UNDP	United Nations Development Programme
UNFPA	United Nations Population Fund
UNICEF	United Nations International Children’s Emergency Fund
USD	United States dollars
VET	Vocational Education and Training
WB	World bank

I. EXECUTIVE SUMMARY

Labour migration from Central Asia to the Russian Federation and Kazakhstan is one of the largest and most important migration corridors not only in Eurasia, but at global level. According to the Federal State Statistics Service (Rosstat) an average of approximately 3.9 million Central Asian migrant workers are employed in the Russian Federation alone each year, including some two million citizens of Uzbekistan, one million citizens of Tajikistan, and 880,000 citizens of Kyrgyzstan. Labour migration plays an important role in the economic development of both the migrant-sending and the host countries of Central Asia, the Russian Federation and Kazakhstan, as migrant workers meet labour market needs for both high and lower-skilled workers in the host countries, as well as relieve tension in labour markets and contribute to poverty reduction in communities of origin through remittances and other financial contributions.

Despite the importance of labour migration for the region, it still remains largely unregulated: the proportion of migrant workers who are not registered in accordance with all the necessary rules remains high and employment occurs to a greater extent through social networks rather than through proficiency testing and more formal job matching tools. Also, from the perspective of destination countries and employers, the current mechanism of using foreign workers is characterized by a mismatch (gap) between the actual demand for specialists and available workers with key professional skills, which leads to low productivity and lost economic benefits, as well as non-optimal use of human resources. From the migrants' perspective, poorly managed recruitment can lead to informal employment and greater risks of abuse and exploitation, and for the country of origin, informal employment and poor skills matching can limit the positive development impacts of migration.

For this project, a comprehensive analysis was conducted of the supply and demand for migrant workers in the Central Asia-Russian Federation migration corridor, including data on the motivations, needs and behavior of employers and migrant workers, as well as the different actors managing labour migration in the region (such as private employment agencies, non-governmental organizations, trade unions, government agencies).

The study was conducted synchronously in the host countries – the Russian Federation and Kazakhstan, as well as in the three countries of origin – Uzbekistan, Kyrgyzstan and Tajikistan – according to the agreed methodology and with the financial support of the Swiss Agency for Development and Cooperation (SDC).

The research, implemented within the inception phase of a broader upcoming Labour Migration Programme, identified four key challenges that inhibit effective governance of labour migration in the region:

- Lack of mechanisms for regular communication and coordination among stakeholders involved in the governance and implementation of labour migration between origin and destination countries, resulting in high level of inefficiency and protection issues for migrants.
- Lack of institutional capacity among State Recruitment Agencies (SRA)/Private Recruitment Agencies (PRA) to effectively identify and respond to employer and migrant needs and priorities within recruitment.
- Limited knowledge among employers in the Russian Federation on the value, opportunities, or how to access recruitment services for workers from Central Asia.
- Limited interest or knowledge among prospective migrant workers on how to access recruitment services and limited knowledge of services in countries of destination providing social protections.
- While further research is needed, some bottlenecks and issues of the current organized recruitment framework for migration from Central Asia to the Russian Federation can already be derived.
- Lack of uniform understanding and support for the 'organized recruitment' concept by employers. At present, organized recruitment procedures are largely considered a temporary solution to meet labour market needs during the Covid pandemic. Employers are not seeing this as a strategic development of the recruitment system over the longer term.
- Organized recruitment is not classified into a separate form of migrant employment in the countries of destination, as well as Central Asian labour migration legislation. As such, there are no real incentives in place for all participants of the organized recruitment mechanism.
- The organized recruitment framework in place currently only covers Uzbekistan and Tajikistan and is therefore rather localized and small in scope.
- Poorly developed institutional mechanisms for sustained coordination and communication between the relevant stakeholders within the organized recruitment mechanisms in the countries of origin and destination.
- The recruitment and employment procedures for migrant workers in Central Asia and the countries

of destination are insufficiently digitalized leading to inefficiencies and delays that do not meet the needs and expectations of workers or employers.

- There is no clear system for rigorous monitoring of organized recruitment enabled at government level to assist employers with the process.
- Prospective migrants do not consider it necessary and do not see the value in using the services of SRA and PRA in their countries to find a job as they can find a job through their social networks.
- The quality of recruitment and pre-departure training in the countries of origin in Central Asia remains poor due to the absence of uniform recruitment and training standards to meet Russian labour market needs, home countries having no platforms for professional training compliant with the Russian requirements, and underdeveloped infrastructure of training centres for pre-departure orientation of migrant workers in Central Asia.
- Business owners, companies and employers have insufficient awareness about the organized recruitment regulations and guidelines (Operational Guidelines on Foreign Workers' Recruitment in the Russian Federation[1]).
- Inadequate level of public-private partnership (PPP) mechanisms to facilitate work permit processing for migrant workers in the regions of the Russian Federation (just a few one-stop-shop migrant centres currently exist).
- Migrant workers are often found to be under-qualified and lacking competence to meet the employer's requirements and expectations.
- Legal and financial literacy and proficiency in Russian of migrant workers in Central Asia remains low.
- Migrant workers have been reported to be poorly informed about the specifics, procedures, terms and conditions, and qualification requirements for employment in the countries of destination.

Some specific recommendations on improvement of labour migration management within the Central Asia-Russian Federation corridor, particularly related to the identified areas of work above, were developed in the course of this research. They are listed in the Conclusions and Recommendations chapter.

[1] Operational guidelines on Foreign Workers' Attraction to the Economy of the Russian Federation/Recruitment (*consultant.ru*)

II. INTRODUCTION

For this project, a comprehensive analysis was conducted of the supply and demand for migrant workers in the Central Asia-Russian Federation migration corridor, including data on the motivations, needs and behavior of employers and migrant workers when it comes to recruitment decisions, as well as the different stakeholders active in labour migration in the region (private employment agencies, non-governmental organizations, trade unions, government agencies).

On the demand side, the needs of employers and the particularities of recruiting migrant workers in the two countries were identified; mechanisms for the organized recruitment of foreign labour, including their strengths and weaknesses were ascertained; sectors and professions most relevant for inclusion in the scheme of organized recruitment of migrant workers from Central Asia in the medium term were identified; opinion, conditions of implementation and problems of particular employers implementing the process of organized recruitment of migrant workers from Central Asian countries were collected.

Demand side objective of the study: identify and assess the foreign workforce needs and anticipated recruitment procedures that would need to be in place in the medium term until 2025 in key regions of the Russian Federation taking into account the conditions and employer interest in an organized recruitment process for migrant workers in various sectors, and in a range of occupations from countries of origin in Central Asia.

Hypothesis 1. In the context of the demographic situation (decreasing working age population) and socio-economic development (growing needs in the labour market) in the Russian Federation and Kazakhstan, the need for labour force will increase in the medium term, wherein the Central Asia region will remain the most accessible source for employers due to historical and cultural features.

Hypothesis 2. The organized labour recruitment mechanism based on interstate agreements between the Russian Federation and Uzbekistan and Tajikistan during the COVID-19 pandemic has received additional impetus for development and may, in the future, become an important mainstream component of regulated labour migration in the Central Asia–Russian Federation migration corridor with appropriate support from international organizations and development of interstate dialogue between the concerned states in the region, eventually largely replacing the informal social networks that currently dominate the corridor.

On the supply side, in the countries of origin of migrant workers (Kyrgyzstan, Tajikistan, Uzbekistan), the study focused on:

Component 1. Decision-making behaviour of prospective migrant workers and returnees. The purpose of this research component was to understand the existing communication networks and decision-making processes of migrants in determining where and how to migrate. Through quantitative research, the component focused on identifying the behavioral aspects of prospective migrant workers and returnees regarding their approaches to employment and the factors that influence their decisions and choices when seeking employment abroad. Research under Component 1 was based on two hypotheses.

Hypothesis 1. It is commonly shared among migrants returned from the Russian Federation and Kazakhstan that their experience with recruiters had not been smooth or safe, especially in terms of work placement and contracts, which is often linked with the informality and precarious nature of migrant jobs in the Russian Federation and Kazakhstan. As such, prospective migrants may be averse to using recruitment agencies to find employment in the Russian Federation and Kazakhstan due to negative experiences and expectations of poor value for money. New recruitment networks will have to respond to needs and expectations of prospective migrants to add value and be successful.

Hypothesis 2. Prospective migrants have become accustomed to conducting preliminary job searches through informal channels rather than through established agencies, leading to skills mismatch, irregularity and informality in employment. As such, engaging prospective migrants in organized recruitment would require a communications strategy that penetrates these informal channels of communication.

Component 2. Capacities and constraints of public (state)/private recruitment agencies and public (state)/private vocational training centres. The objective of this research component was to understand structural/institutional factors enabling or limiting public (state) and private recruitment agencies and public (state) and private vocational training centres in Kyrgyzstan, Tajikistan and Uzbekistan to ensure successful job placement in the Russian Federation and Kazakhstan. According to the research methodology of Component 2, the following hypotheses were made based on the expectations of finding elements that contribute to the successful employment of migrants in the country of destination.

Hypothesis 1. Private and public institutions lack certain human and financial resources required to develop successful job matching with countries of destination.

Hypothesis 2. Current recruitment mechanisms provide limited advantages for migrant workers to the Russian Federation in comparison to other job searching methods, thus making such services uncompetitive.

III. METHODOLOGY

i. Research methodology in the Russian Federation

The situation in the Russian Federation was studied by scientists from the Institute of Demographic Research of the Federal Research Sociological Centre of the Russian Academy of Sciences (IDR FRSC RAS) with the support of the IOM Moscow office through a mass sociological survey of employers and qualitative in-depth interviews with employers and labour migration experts in key regions of the country.

Key areas of research included:

- identify specific sectors and professions most relevant for inclusion in the scheme of organized recruitment of migrant workers in the Russian Federation;
- identify employers willing to support the new process of organized recruitment of migrant workers;
- determine the conditions for the design and implementation of a migrant recruitment program which should be in place to make organized recruitment attractive (in terms of cost, processing, duration and technology of recruitment procedures, qualifications of workers).

Specific research objectives included:

- identify the scale, socio-demographic structure, professional and qualification characteristics of foreign workforce from Central Asian countries engaged by employers in the Russian Federation in the study regions in 2019-2021, taking into account the transformation of employment in regional labour markets during the COVID-19 pandemic;
- identify factors affecting employers' demand for foreign workers in general and from Central Asian countries in particular at the current time and in the medium term until 2025, taking into account the transformation ("reshaping") of regional labour markets under the impact of the COVID-19 pandemic;
- identify the current needs of employers in regards to the foreign labour force in general and from Central Asia in particular by economic sectors and key professional and qualification groups of workers in the regions of the study;
- identify employers' preferences in terms of geography of origin, professional and qualification characteristics, required professional skills and competencies of foreign workers;
- identify the current prevalence of organized labour recruitment mechanisms in Central Asian countries in the regions of the study, and assess the effectiveness of the mechanism of organized recruitment of foreign labour from Uzbekistan, Tajikistan and Kyrgyzstan during the COVID-19 pandemic in 2020-2021;
- identify the key challenges of employers in the Russian Federation in the organized recruitment and employment of workers from Central Asian countries at the moment;
- develop recommendations to improve and enhance the process and development of organized labour recruitment programs in Central Asian countries to work in the Russian Federation.

Additional (auxiliary) research objectives included:

- assess (forecast) the need for a foreign workforce from Central Asian countries until 2025 by employers in the Russian Federation in the key regions of the study (including by industry and professional qualification groups), taking into account demographic trends, the labour market situation and other socio-economic factors;
- identify "internal reserves" of labour supply from Central Asian countries located in the study regions from quantitative and qualitative points of view (citizens of Uzbekistan, Tajikistan, Kyrgyzstan, currently seeking employment in the Russian labour market, including women and youth) based on the analysis of CV data of potential workers (job seekers).

Literature Review:

The main sources of information were scientific publications and reports of international organizations including IOM, ILO, UNFPA and UNDP on labour migration and labour markets in the Russian Federation and Central Asian countries.

The study uses official statistics from Rosstat, derived from population censuses and current records, as well as from the national labour force survey and the use of migrant labour, provided in official collections and electronic resources. Data derived from the General Directorate for Migration Issues of the Ministry of Interior of the Russian Federation include: 1) the number of facts of registration of foreign citizens at the place of stay for the purpose of "employment" of migrant workers; 2) the number of notifications to employers on contracts with workers from Uzbekistan, Tajikistan, Kyrgyzstan; 3) the number of patents issued for citizens of Uzbekistan and Tajikistan to work in the Russian Federation. Based on the statistics, the current need for foreign workers in general and from Central Asia in particular has been assessed by economic sectors and key professional and qualification groups of workers in the regions of the study; as well as a forecast of the need for a foreign labour force from Central Asian countries until 2025 by employers in the Russian Federation in the key regions of the study (including by industry and professional qualification groups), taking into account demographic trends, the labour market situation, and other socio-economic factors.

Job bank data was analyzed on the socio-demographic characteristics of migrant workers presented in the CVs of job seekers on one of the internet resources (Job.RU, HH). The job market data of Central Asian nationals' CVs (97,000) for 2019-2020 has been processed in key research regions. Data were collected and analyzed using modern data mining techniques. Each CV provides about 50 indicators including age, gender, marital status, salary expectations, education, work experience, nationality, willingness to relocate.

Field research:

Based on sociological methods, a mass survey of employers (quantitative method) and in-depth interviews with experts (qualitative method) were conducted. The employer survey was based on a questionnaire with 37 questions grouped into the following categories: 1) general information about the company (organization); 2) labour resources of the company (organization); 3) general principles and features of the organized recruitment system; 4) functioning of the mechanism of organized recruitment of labour force. The questions in the questionnaire were of a closed type, with some questions offering multiple answer options.

The sample for the quantitative sociological survey of employers in the six regions of the study was based on data from a sample survey of migrant workers conducted by Rosstat in 2019 [Access mode: *https://gks.ru/free_doc/new_site/imigr18/index.html*]. The principle of sample design is quota-based. The sample initially included 426 employers and was representative of the sectoral use of foreign nationals by entrepreneurs based on data from the above-mentioned Rosstat observation.

Employers were surveyed in three ways: in-person, via means of telecommunication (telephone survey, ZOOM survey), and by sending e-mails to the company (organization) managers. Questionnaires were answered by deputy directors for HR policy or heads of HR departments. About 477 questionnaires were received as a result of the sociological survey but, after checking the questionnaires, 473 questionnaires from employers of different types (except households) were retained for analysis.

In-depth interviews were conducted on the basis of an interview guide which included nine open-ended questions on the specifics of the use of labour force from Central Asian countries in the Russian Federation and the mechanisms of the organized recruitment system. 35 in-depth expert interviews were conducted during the study. Representatives of state structures (Federal Labour and Employment Service of the Russian Federation, Saint Petersburg Labour Committee) were interviewed as experts; large-scale employers; interstate organizations (Eurasian Economic Commission); employers' associations (Russian Union of Industrialists and Entrepreneurs, International Association of Labour Migration and other); recruiting agencies involved in recruitment and organized recruitment of foreign workforce to the Russian labour market; academics, lawyers, and human rights activists in the field of labour migration. In-depth interviews with experts were conducted in person and online using Skype and ZOOM.

Table 3.1. Quantitative results of the survey of employers in the Russian Federation (May-June 2021): distribution of employers by industry

Regions	Construction and repair of buildings and structures	Industrial production	Agriculture	Trading, catering, hotel business	Transport, passenger and freight transportation	Other industries	**Total**
Moscow	14	21	1	84	13	3	**136**
Moscow Region	22	21	8	31	0	0	**82**
Saint Petersburg	37	10	1	23	17	10	**98**
Leningrad Region	28	1	1	9	3	0	**42**
Republic of Tatarstan	23	7	2	16	5	22	**75**
Sverdlovsk Region	20	1	2	14	0	3	**40**
Total	**144**	**61**	**15**	**177**	**38**	**38**	**473**

Table 3.2. Quantitative results of the survey of employers in the Russian Federation (May-June 2021): distribution of employers by company size

Regions	Microbusinesses (up to 15 people)	Small businesses (from 15 to 100 people)	Medium businesses (from 100 to 250 people)	Large businesses (more than 250 people)	**Total**
Moscow	70	41	10	15	**136**
Moscow Region	30	4	34	14	**82**
Saint Petersburg	34	43	10	11	**98**
Leningrad Region	12	12	18	0	**42**
Republic of Tatarstan	18	19	15	23	**75**
Sverdlovsk Region	17	1	14	8	**40**
Total	**181**	**120**	**101**	**71**	**473**

ii. Research methodology in Kazakhstan

The study in Kazakhstan was conducted by a group of international and national experts, taking into account the place and role of the country in the Central Asia – Russian Federation migration corridor. Kazakhstan plays two roles in this system, as a country of transit and destination for migrant workers.

The main objectives of the study were to identify the factors influencing employers' demand for foreign workers from Central Asian countries, identifying the current demand for foreign workers and employers' preferences for hiring migrant workers; the existence of organized labour recruitment mechanisms; and develop recommendations for the development of mechanisms for the organized recruitment of migrant workers from Central Asian countries. The research methodology includes desk and field research based on quantitative and qualitative data collection methods.

Desk Research:

The desk research reviewed the current migration situation and migration policy of Kazakhstan with regards to labour migration. Statistical analysis of the flows and categories of migrant workers by key qualitative and quantitative characteristics, as well as the main sectors and regions of employment of migrant workers in the Kazakhstan. Data was provided by the Ministry of Labour and Social Protection, Ministry of Interior, Ministry of Foreign Affairs, Nur-Sultan and regional Akimats regarding

Table 3.3 Quantitative results of the survey of employers in Kazakhstan (May-June 2021): distribution of respondents by region, legal structure, industry

Regions	Number of respondents	Company (entity) type by the legal structure	Number of respondents	Area of economic activity	Number of respondents
City of Nur-Sultan	10	Sole proprietor	6	Construction and repair of buildings and structures	10
North Kazakhstan Region	6	Joint-stock company	5	Industrial production, mining	15
East Kazakhstan Region	17	Limited liability company	41	Agriculture	16
Karaganda Region	7	Farm	5	Trading, catering, hotel business	10
Pavlodar Region	6			Transport, passenger and freight transportation	2
Kostanay Region	5			Food industry	1
Akmola Region	6			Metallurgical industry	1
				Information technologies	1
				Other services	1
Total	**57**		**57**		**57**

the current situation and assessment of the need for migrant workers in the national and regional labour markets, their quantitative and qualitative characteristics, as well as the current rules for attracting foreign workers in Kazakhstan.

Field research:
Researchers in Kazakhstan used quantitative (questionnaire survey) and qualitative (in-depth interview) data collection methods.

As part of the quantitative research, a questionnaire survey of employers in the format of an online questionnaire on the Google Forms platform (taking into account the quarantine situation for COVID-19) was conducted in the cities of Almaty and Nur-Sultan, as well as in all regions of the country. Respondents were selected through a stepwise search. For the first stage, data on employers was collected through the entrepreneurial departments of the regional authorities. In the second phase contacts by mail or phone were made with the employers. In the third stage, face-to-face meetings were held with respondents who expressed their willingness to participate in the survey. A total of 130 potential employer respondents were selected. As a result of personal interviews, 57 questionnaires were completed on the Google Forms platform. The data obtained was processed in the SPSS program. A significant limiting factor in the collection of quantitative data was the quarantine measures and lack of direct contact with employers, as public services are provided on the e-Government (e-gov) platform.

In terms of qualitative sociological research, in-depth interviews were conducted with representatives of the Ministry of Labour and Social Protection, Ministry of Interior, Ministry of Foreign Affairs, employees of Akimats and the departments of the migration service of Karaganda, Kostanay, Pavlodar, Akmola, North Kazakhstan and East Kazakhstan regions, and Nur-Sultan city, according to the research guide. A total of 20 in-depth interviews were obtained. In-depth interviews were audio-recorded and transcribed.

iii. Research methodology in Central Asia

The research on formal and informal recruitment schemes in Kyrgyzstan, Tajikistan and Uzbekistan focused on the attitudes and perceptions of returnee and prospective labour migrants, and recruitment agencies as well as on the system of skills development of the labour migrants from Central Asia. Optimization of the skills and jobs matching services of the organized recruitment as an alternative to informal migrant work in Russian Federation and Kazakhstan were explored with an emphasis on rights protection within the system of formal labour recruitment.

Two instruments, 1) the survey questionnaire for quantitative survey of prospective and returnee labour migrants and 2) the design-scenario for focus-group discussions (format of written questionnaire and script of the discussions' proceedings) were developed by the IOM missions in Kyrgyzstan, Tajikistan and Uzbekistan. A field manual for both methods of data collection was prepared that also included the history of the project, goals, methodology, roles and responsibilities of the research team, and interview protocol. The coordinators then used the training materials to train local data collectors (representatives of local NGOs and consultants) with the technical assistance of the project coordinator.

Research Scope:
The aim of this research was to identify the needs and preferences of migrant workers in regards to searching for employment abroad and related decision-making patterns in order to inform the design of a more attractive formal recruitment system which can ensure skills matching and protection of their rights. The following units of analysis were studied and analyzed:

- Existing networks and decision-making processes of prospective labour migrants when determining where and how to migrate;
- Capacities, constraints and expectations of key stakeholders within the recruitment process including public and private recruitment agencies (PRAs) and public and private vocational training centres;
- Conditions for the design and implementation of the recruitment programme that are required to meet needs, expectations, and buy-in of prospective migrants and stakeholders within the recruitment process in countries of origin.

Desk Research / Literature Review:
Desk research on recent literature (publications within the last five years) on migrants from Kyrgyzstan, Tajikistan and Uzbekistan was conducted prior to developing survey and focus-group discussions' questions, to focus the questions on obtaining new information. The desk research focused on reviewing literature on migrants from Kyrgyzstan, Tajikistan and Uzbekistan regarding their recruitment/employment patterns, employment conditions and risks of and/or actual exploitation in recruitment/employment. In addition, desk research on recent publications and media reports (within the last five years) on the use of public/private vocational training and recruitment agencies and their roles for migrants from Kyrgyzstan, Tajikistan and Uzbekistan was carried out.

For Component 1 (Decision-making behavior of prospective migrant workers and returnees), quantitative data from returned migrant workers and prospective migrant workers was collected primarily using the CATI (Computer-Assisted Telephone Interviewing) method in Kyrgyzstan, Tajikistan and Uzbekistan. Two types of online surveys were developed using the Kobo Toolbox: one for returned migrants and one for prospective migrants. Returned migrants were individually identified and contacted by local social workers/NGO partners upon their consent. The survey was conducted via phone and the information was recorded using Kobo Toolbox. Contact information from potential migrants was collected at information consultation centres, NGOs and/or relevant government agencies upon the potential migrants' consent and then contacted by the interviewer.

The cleaning and analysis of the survey was conducted using SPSS, first frequencies and crosstabs, data tables and pie charts were built in Excel and so was documented for storage.

Quantitative research was conducted in the following steps:

- Identifying returned migrants through existing IOM projects with the assistance of NGO partners, government agencies and information consultation centres (ICCs)
- Kyrgyzstan and Tajikistan: ICCs, existing IOM project
- Uzbekistan: Existing IOM project (MPTF-1 JP), NGO databases, database of territorial departments of the Ministry of Mahalla and Family support
- Surveying results were collected and cleaned using SPSS standard and Excel
- Collected data was analyzed based on a descriptive characterization of migrants' behavior in looking for employment abroad and identifying correlation among factors that affect their decisions. Analysis was done using both aggregate and disaggregated data

Sampling:

Numbers of migrants from Kyrgyzstan, Tajikistan and Uzbekistan in the Russian Federation used in the table below are from the Ministry of Internal Affairs of the Russian Federation in 2019. The proportion of survey participants from each country was determined based on gender and age make-up of the labour migrant population. Sample size was calculated using below formula with 9 per cent confidence level and 5 per cent margin of error:

n = [z2 * p * (1 - p) / e2] / [1 + (z2 * p * (1 - p) / (e2 * N))]
n = sample size
p = sample proportion = 0.5
z = z-score at 90 per cent confidence level = 1.96
e = margin of error = 0.05
N = population size

For the convenience of division, each country's survey totaled 384 migrants.

Table 3.4. Number of migrants from Kyrgyzstan, Tajikistan and Uzbekistan in the Russian Federation in 2019 and disaggregated sample size of survey participants by country

Country of Origin	Number of migrants in the Russian Federation 2019	Sample Size (total) 2021	Share of returned migrants	Share of potential migrants
Kyrgyzstan	453,702	384	50%	50%
Tajikistan	1,179,423	385		
Uzbekistan	2,107,302	385		

- Identifying potential migrants in Kyrgyzstan, Tajikistan and Uzbekistan through ICCs, NGOs and relevant government agencies.
  - Kyrgyzstan: ICCs in Bishkek and Osh
  - Tajikistan - ICCs in Dushanbe, Khorog (GBAO), Bokhtar (Khatlon region), Khujand (Sogd region)
  - Uzbekistan – Government agencies (Ministry of Mahalla and Family support, Territorial offices of Agency for External Labour Migration), NGOs in Surkhandarja, Andijan, Qashqadarya, Jizzah, Bukhoro, Fergana regions, Private employment agencies)
- Conducting surveys either via phone or offline with returned and potential migrants and recording the information using online surveys developed on Kobo ToolBox

The sampling frame for this research was as following:

Both men and women, proportional to the migrant population statistics

60 per cent male and 40 per cent female in Kyrgyzstan

85 per cent male and 15 per cent female in Tajikistan

75 per cent male and 25 per cent female in Uzbekistan

Working men and women aged 18 to 60

34 per cent - 18-25 years old, 33 per cent 26-35 years old, 33 per cent - 36-60 years old – (men and women)

50 per cent - prospective migrants, 50 per cent - returned migrants.

Table 3.5. Disaggregated sample size of returned and prospective migrant workers

	Kyrgyzstan		Tajikistan		Uzbekistan	
Returned / Prospective migrant workers	Male: 115	Age 18-25: 39	Male: 163	Age 18-25: 55	Male: 144	Age 18-25: 48
		Age 26-35: 38		Age 26-35.: 54		Age 26-35: 48
		Age 36-60: 38		Age 36-60: 54		Age 36-60: 48
	Female: 77	Age 18-25: 26	Female: 29	Age 18-25: 10	Female: 48	Age 18-25: 16
		Age 26-35: 26		Age 26-35: 10		Age 26-35: 16
		Age 36-60: 25		Age 36-60: 9		Age 36-60: 16
Total	**192**	**192**	**192**	**192**	**192**	**192**

Data Collection & Analysis:

For Component 2 (Capacities and constraints of public/private recruitment agencies and public/private vocational training centres) focus group discussions were used to collect qualitative data for this research component. FGDs were conducted in local languages with between 5 to 10 participants per group with at least four observers from IOM taking notes during the discussions. 50/50 gender parity was considered when selecting participants. All sessions were recorded, and audio file transcripts alongside the observers' notes were included in the final report. Decision on whether an FGD would be conducted online or offline was dependent on the practicality. In all FGDs, an expert was present online to facilitate the discussion along with IOM staff. Each FGD did not last longer than two hours.

The research was conducted in the following steps:

- Identify public and private recruitment agencies and vocational training centres through information consultation centres (ICCs) and government counterparts
- Distribute FGD Questionnaire Part 1 to be filled out prior to the discussion
- Conduct FGDs (online/offline) using FGD Questionnaire Part 2 and produce audio files and transcripts
- Collect data and analyze transcripts and notes
- Identify key findings and potential interventions

Sampling:

There was a total of four FGDs per country, two FGDs with SRAs and PRAs, and two FGDs with public and private vocational training centres. The participants were randomly selected from the list of government-certified public and private recruitment agencies and vocational training centres.

The field data collection was conducted from 8 April to 6 May 2021, a telephone survey was conducted in Kyrgyzstan, Tajikistan and Uzbekistan with a total of 1163 returnee and prospective migrants (Component 1) and 12 focus group discussions (FGDs) with a total of 63 representatives of public/private recruitment agencies and public/private vocational training centres (Component 2).

The main focus of the survey was identifying migrants' needs and preferences when it comes to labour recruitment for employment in the Russian Federation and Kazakhstan. The sampling of respondents for the survey instruments (see Table 3.6. Sampling of the Returnee and Prospective Migrants by country, region, and gender) was formed by the country offices with the help of the local partner organizations. The average sample for all three countries was comprised of 32 per cent female, and 68 per cent male respondents, with a higher share of women in the Kyrgyz sample (40%) and the lowest in the Tajik sample (26%). This sample correlates with official data on sex composition of immigrants from Central Asian countries in the Russian Federation in 2019. Official statistics suggest that female migrants made up 35,0 per cent of migrants from Kyrgyzstan, 33,2 per cent of migrants from Uzbekistan and 31,4 per cent of migrants from Tajikistan.

The main objectives of the focus group discussions (conducted online) were to shed light on the capacity and modes of operation of the public and private recruitment organizations and of the public and private vocational training centres and from thereon to identify the structural/institutional factors enabling or limiting public (state) and private recruitment agencies and public (state) and private vocational training centres in Kyrgyzstan, Tajikistan and Uzbekistan to ensure successful job placement in the Russian Federation and Kazakhstan. The invited participants were representatives of state and private sectors organizations that are actively working on labour migration (mostly to the Russian Federation and Kazakhstan) in Kyrgyzstan, Tajikistan and Uzbekistan.

Table 3.6. Sampling of returned and prospective migrants by country, region and gender

	Returned migrants		Prospective migrants		Totals
	Male	Female	Male	Female	
Kyrgyzstan		**40%**	**60%**	**40%**	
Bishkek city and all regions (Bishkek city, Alamudun distr, Kemin distr, Sokuluk distr, Chui distr)	55	41	105	69	**270**
Osh city and region (Osh city, Nookat distr, Uzgen distr, Kara Suu distr)	64	38	12	9	**123**
Subtotals per country:	119	79	117	78	**393**
Tajikistan	**74%**	**26%**	**71%**	**29%**	
Soghd region (Khujand, Matcha distr)	40	13	40	16	**109**
Khatlon region (Kulyab, Panj)	40	14	40	16	**110**
GBAO (Khorog, Vanj)	40	14	40	16	**110**
RRS (Regions of Republican Subordination, Vahdat)	20	7	20	8	**55**
Subtotals per country:	140	48	140	56	**384**
Uzbekistan	**68%**	**32%**	**77%**	**23%**	
Sukhandariya region (Termez city, Dzarkurgh distr, Kumgurgan distr, Surchinskiy distr, Altynsay distr, Denau distr, Uzunsky distr, Sari-Osinsky distr, Angorskiy distr, Termez distr, Sherabad distr, Muzrabad distr, Kizirik distr, Baiu distr)	73	24	73	24	**194**
Kashkadarja region (Karshi city, Karshi distr, Kitab distr, Shakrisyabz distr, Guzar distr, Chirakchi distr)	59	37	75	21	**192**
Subtotals per country:	132	61	148	45	**386**
Gender distribution total surveys:	68%	32%	69%	31%	**100%**
Total surveys collected	**391**	**188**	**405**	**179**	**1 163**

Table 3.7. Sampling of FGD participants by country, organization, gender

	State		Private		Totals
	Male participants	Female participants	Male participants	Female participants	
Kyrgyzstan	**29%**	**71%**	**27%**	**73%**	
Recruitment Agencies (SRA 1, PRA 5)	3	3	2	3	**11**
Vocational Training Centres (SVTC 8, PVTC 6)	1	7	1	5	**14**
Subtotals per country:	4	10	3	8	**25**
Tajikistan	**75%**	**25%**	**55%**	**45%**	
Recruitment Agencies (SRA 2, PRA 4)	3	1	3	2	**9**
Vocational Training Centres (SVTC 3, PVTC 5)	3	1	3	3	**10**
Subtotals per country:	6	2	6	5	**19**
Uzbekistan	**90%**	**10%**	**78%**	**22%**	
Recruitment Agencies (SRA 1, PRA 1)	4	1	4	0	**9**
Vocational Training Centres (SVTC 1, PVTC 4)	5	0	3	2	**10**
Subtotals per country:	9	1	7	2	**19**
Gender distribution total surveys:	59%	41%	52%	48%	**100%**
Total FGD participants:	**19**	**13**	**16**	**15**	**63**

IV. LABOUR MIGRATION IN SOCIAL, DEMOGRAPHIC AND ECONOMIC CONTEXT

Between the countries of Central Asia on the one hand, and the Russian Federation and Kazakhstan on the other hand, a stable migration corridor has developed that is one of the largest in the world in terms of movement of workers and the transfer of remittances. Kyrgyzstan, Tajikistan and Uzbekistan are active participants of migration processes in the region, being the countries that send a significant number of migrant workers abroad. Labour migration between Central Asian countries and the Russian Federation involves about 4 million people, which is about 15 per cent of the economically active population of Central Asian countries. Large-scale migration processes in the region have significant socio-economic, demographic and political implications for countries of origin and destination. The main destination for workers from the Central Asian region is the Russian Federation. Up to 85 per cent of labour migrants from Tajikistan and Kyrgyzstan and about 70 per cent of labour migrants from Uzbekistan go to the Russian Federation.

i. Labour migration in the Russian Federation

Economic and demographic situation in 2019-2021

The Russian government managed to avoid a second lockdown in 2020, with an 8 per cent year-on-year decline in GDP in Q2 and a 3 per cent year-on-year decline after the recovery began. The Ministry of Economic Development forecasts 2.7-2.9 per cent growth for 2021, 2.8-3.2 per cent in 2022, and 2.5-3 per cent in 2023 and subsequent years.[2] Some more recent estimates assume economic growth of at least 3 per cent in the Russian Federation in 2021.

The economic dynamics by key regions is presented in the forecasts of socio-economic development for 2021 and for the planning period of 2022-2023, developed by the governments of the constituent entities of the Russian Federation. Table 4.1 sets forth conservative (minimal) variants of regional forecasts. “Forecast of socio-economic development for 2021 and for the planning period 2022-2023” varies from region to region in terms of its presentation. In some regions, three options of main macroeconomic indicators are presented in the forecast, in other regions only one option is presented. In order to ensure comparability of data, we present here the minimum options. The implication is that with a higher rate of economic growth, unemployment will decline and demand for foreign labour will be stable or increase.

In the Russian Federation, over the last twenty years, there has been a fairly steady reduction in the overall mortality rate and an increase in life expectancy. The basis of positive dynamics of the said indicators was the growth of GDP, improved living standards of the population, reduction of consumption of strong alcoholic beverages, tightening of traffic rules and the practice of administrative and criminal penalties for violations of rules and regulations that are harmful to public health. The establishment of perinatal, cardiology and other high-tech medical centres in the regions of the Russian Federation has also had a positive impact on reducing some components of overall mortality in the period up to and including 2019. The COVID-19 pandemic reversed this trend. The total increase in the number of deaths in 2020 compared to 2019 was 323,800 people. This is the excess mortality (super mortality) for 2020. Accumulated excess mortality for the period March 2020 to April 2021 amounted to 607,000 people. In 2018, those aged 15-64 accounted for 33.5 per cent of all deaths. Thus, the reduction in the working-age population in the Russian Federation, and consequently in the workforce, during the pandemic at the time of writing can be tentatively estimated at 200,000 people.

The working age population is the basic demographic parameter to support the forecasting of labour resources, workforce and labour market developments. One of the main challenges in the economy of the Russian Federation and its regions in the 2010s was the reduction in working age population which was only partly offset by net immigration. Once the populous post-war baby boomers have reached their retirement age, with a low count of people born during the demographic crisis of the 1990s and coming to their working age, the population count of this age group, having surpassed its peak (90.2 million people) in 2005, subsequently entered a phase of decline.

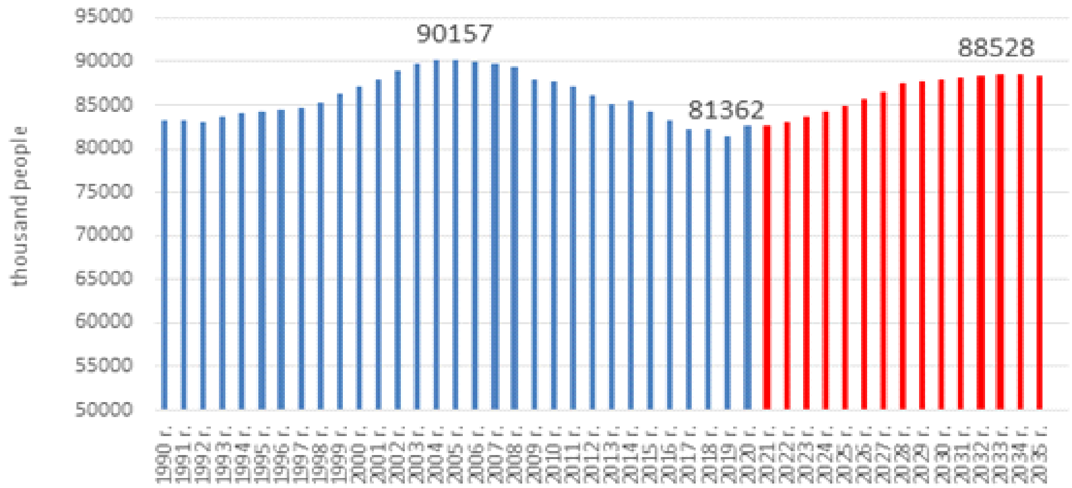
After introducing amendments to the pension legislation of the Russian Federation in 2018 and transition to a phased rise in retirement age over 2019–2023 from the previous 60 (55) years to 65 (60) years, the decline in the working age population count discontinued, rebounding from the low in 2019 (81.4 million people), this figure has increased to 82.7 million people by the beginning of 2020. Further growth of this population group will end in 2020–2021 due to excess mortality among the working age population. In 2021, Rosstat may need to update

[2] Scenario conditions, key parameters of the forecast of socio-economic development of the Russian Federation and forecast changes in prices (tariffs) for goods and services of economic entities engaged in regulated activities in the infrastructure sector for 2022 and for the planning period 2023 and 2024. URL: *https://www.economy.gov.ru/material/directions/makroec/prognozy_socialno_ekonomicheskogo_razvitiya/scenarnye_usloviya_osnovnye_parametry_prognoza_socialno_ekonomicheskogo_razvitiya_rf_na_2022_god_i_na_planovyy_period_2023_i_2024_godov.html*

Table 4.1. GDP/GRP dynamics in the Russian Federation and key regions in 2020-2023, (conservative estimates)

	2020	2021	2022	2023
	as a % to previous period			
	report	forecast	forecast	forecast
Russian Federation	97.0	102.7	102.8	102.5
Moscow	97.6	103.3	103.4	103.4
Moscow Region	96.5	101.6	102.7	102.5
Saint Petersburg	96.0	102.6	102.7	103.1
Leningrad Region	100.1	101.8	102.4	102.5
Republic of Tatarstan	96.0	103.9	102.9	103.2
Sverdlovsk Region	95.4	99.6	101.0	101.7

Figure 4.1. Working age population in the Russian Federation in 1990–2035, considering the retirement age increase (Report for 1990–2020; Base case forecast for 2021–2035) (Source: Rosstat, 2020)



Note: Report for 1990–2020; Base case forecast for 2021–2035. Source: Rosstat, 2020.

their current population projections for the period until 2035. When evaluating the prospects of employment and labour migration in the Russian Federation in 2021–2025, we will rely on the official forecast published in 2020.[3] According to the forecast developed for three case options, the working age population in the Russian Federation, by 2025, will increase to 83.9–85.6 million people. The main base case parameters until 2025 are shown in Table 4.2.

Under the base demographic case, the count of the potential working age population will increase in all the key regions of the Russian Federation. Russian labour resources will continue to concentrate in megacities and other key regions. The increase in working age population in the six key regions of concern over 2020–2025 will surpass one million people reaching 44.4 per cent of the total increase for this category in the Russian Federation.

Due to this concentration, the share of the six regions in the working-age population of the country will increase from 24.8 per cent to 25.3 per cent in 2021. Such concentration creates conditions for outrunning growth of the gross regional product (GRP) in these regions.

The increase in working age population may, to some extent, affect the requirement for foreign migrant workers in the Russian Federation and its regions. Obviously, the main driving force of such requirement is not on the side of demography, but production and its staffing with various expertise. No major rise is expected in competition in the regional labour markets between 'former retirees' and foreign migrant workers, as they are positioned in different segments of the labour market. Senior workers have a poorer health status, but medium-to-high qualifications. They are usually engaged in different types of activities than mainly young, healthy but on average less qualified migrant workers. Moreover, with the raised retirement age, the real status of most workers

[3] Forecasted population count of the Russian Federation until 2035. Statistical bulletin. M.: Federal State Statistics Service. 2020.

Table 4.2. Working age population in the Russian Federation and key regions in 2015-2025, thousand people

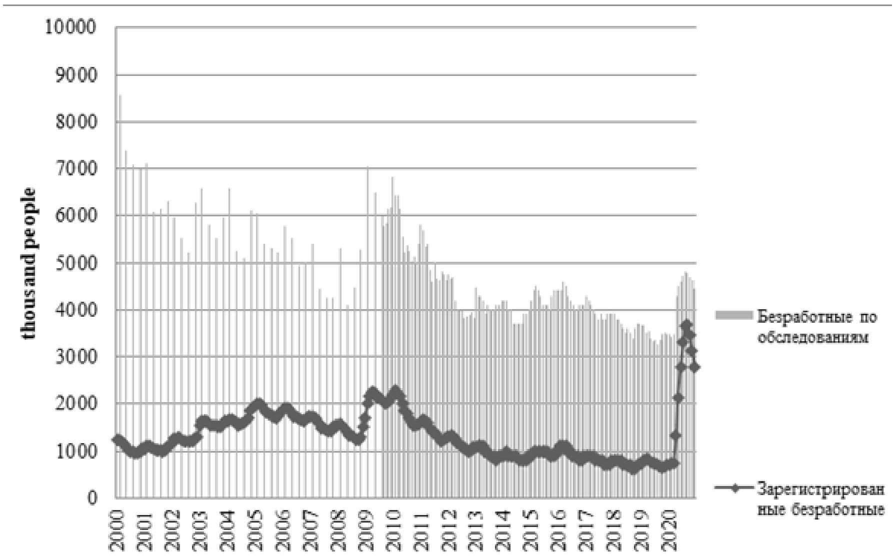
	2015	2016	2017	2018	2019	2020
	Reporting data, thousand people					
Russian Federation	85,415	84,199	83,224	82,264	81,362	82,678
Moscow	7,320	7,246	7,225	7,193	7,240	7,287
Moscow Region	4,313	4,319	4,316	4,332	4,402	4,471
Saint Petersburg	3,091	3,080	3,088	3,070	3,090	3,110
Leningrad Region	1,032	1,027	1,030	1,044	1,037	1,086
Republic of Tatarstan	2,227	2,202	2,176	2,151	2,163	2,174
Sverdlovsk Region	2,438	2,400	2,367	2,338	2,352	2,365
	2021	2022	2023	2024	2025	Change over 2020–2025
	Forecast (base case), thousand people					
Russian Federation	82,765	83,143	83,596	84,246	84,956	2,278
Moscow	7,337	7,376	7,415	7,471	7,530	244
Moscow Region	4,543	4,615	4,690	4,774	4,863	391
Saint Petersburg	3,141	3,166	3,191	3,223	3,256	147
Leningrad Region	1,107	1,128	1,149	1,171	1,195	109
Republic of Tatarstan	2,180	2,187	2,195	2,209	2,225	51
Sverdlovsk Region	2,373	2,383	2,396	2,414	2,434	68

Source: Rosstat, 2020.

over 55–60 years old will not change in the near future as they are already employed: most of those affected by the pension reform (as seen from Rosstat's balance of labour resources) are retirees continuing to work. In 2018, they accounted for 7.5 million people, (ca. 10 per cent of the workforce currently employed in the Russian economy).

According to the labour force survey, the workforce (economically active population) in the Russian Federation decreased from 75.7 million people in August 2019 to 75.2 million people in December 2020. The real number of labour force (supply on the macro labour market) in 2020 could change upwards due to changes in the retirement age, or downwards as a result of border closures for migrant workers, but no significant changes

Figure 4.2. Unemployment according to Rosstat surveys and registered unemployment in the Russian Federation from 2000-2021



Source: Rosstat.

Table 4.3. The count of labour force, employed and unemployed individuals, unemployment rates in the Russian Federation and key Russian regions in 2019–2020.

	Labour force, thousand people		Employed individuals, thousand people		Unemployed individuals, according to population surveys, thousand people		Unemployment rate as a % of labour force		Unemployed individuals in 2020 as a % of 2019
	2019	2020	2019	2020	2019	2020	2019	2020	
Russian Federation	75,225.7	75,043.2	71,764.5	70,463.7	3,461.2	4,579.5	4.6	6.1	132.3
Moscow	7,295.7	7,294.8	7,196.2	7,031.9	99.5	262.9	1.4	3.6	264.1
Moscow Region	4,177.2	4,140.0	4,063.3	3,969.4	113.9	170.6	2.7	4.1	149.7
Saint Petersburg	3,065.8	3,108.0	3,024.0	2,996.5	41.8	111.5	1.4	3.6	266.8
Leningrad Region	966.9	987.2	929.5	928.3	37.4	58.9	3.9	6.0	157.4
Republic of Tatarstan	2,031.1	2,026.1	1,964.6	1,954.8	66.4	71.4	3.3	3.5	107.4
Sverdlovsk Region	2,120.8	2,109.5	2,031.6	1,991.2	89.2	118.3	4.2	5.6	132.5
6 regions in % from the Russian Federation	26.1	26.2	26.8	26.8	13.0	17.3	2.3	4.0	177.0

Source: Rosstat.

in the officially recorded number of the labour force in 2020 were recorded under the Rosstat methodology. The number of unemployed, according to surveys, has cyclically (less unemployed in summer, more unemployed in winter) decreased from a peak of 10.4 million people in February 1999 (the global financial crisis and default in the Russian Federation) to 3.5 million people at the beginning of 2020.

The massive release of workers by Russian companies in April-August 2020 led to spike in registered unemployment from 0.7 million at the beginning of the year to 3.7 million people in September (4.9 per cent of the workforce). The number of people who turned to the state for help in finding work hit an all-time high within the 29 years of the system. The previous high was 2.8 million, observed in April 1996. Thanks to the Russian Federation's economic recovery in October 2020, de-registration of the unemployed exceeded registrations since that month, and their number had fallen to 2.8 million people (3.7%) by December. In April 2021, the registered unemployment rate was 1.5 million people (2.1%).

In the Russian Federation there is a high regional differentiation of levels and dynamics of employment and unemployment. Key Russian regions concentrated 26.8 er cent of all employed in the economy and only 13 per cent of the unemployed in 2019. In all these regions, the unemployment rate was well below the national average, with Moscow and Saint Petersburg having rates below 1.5 per cent allowing us to speak of full employment in the megacities.

In the Russian Federation, employment by industry type within the framework of labour force balance and labour force survey, is tracked with a long lag. Labour force survey data are presented in Table 4.4 in a more operational mode – monthly monitoring of the sectoral structure is carried out for large and medium-sized companies. The absence of small businesses in this database is a major limitation to its analytical value amid the current crisis because it is the small businesses that are most impacted by the pandemic and lockdowns. We began our analysis of changes in the sectoral structure of employment in the economy with this narrow base, then moved on to the broader data from the labour force survey.

In the large and medium size business segment (coverage as of December 2020 was 33.5 million working population), despite the provided government support, the most affected sectors were realtors, agriculture and construction. In mining, the number of employed individuals declined at the expense of the coal industry (down by 3.5 per cent), while the number of those employed in the oil and gas sector increased. Overall, the number of jobs in this sector increased by 0.7 per cent. In mid-2020, the number of jobs in manufacturing declined by 2 per cent but bounced back, concluding the year with a decline of only 0.8 per cent. The employment rate in food manufacturing decreased by an aggregate of 2.5 per cent, by 4.7 per cent in automotive, by 5.3 per cent in furniture manufacturing, by 8.3 per cent in leather goods making (including footwear) along with a dramatic slump in the printing trade, including books, magazines — by 9.6 per cent (in mid-2020, the employment rate was down by around 15 per cent in this sector).

According to the labour force survey for 2020 (coverage as of December 2020 was 70.8 million of the employed population), the largest drop in demand for labour was observed in construction – less 12.8 per cent. This is one of the main areas of employment of migrant

Table 4.4. Working population of the Russian Federation aged 15+ years by type of economic activity at their primary job in 2019-2020

	Total	Agriculture and forestry, hunting, fishing and fish farming	Mining	Manufacturing	Electricity, gas and steam supply, air conditioning	Water supply and discharge; waste collection and disposal, pollution elimination	Construction	Wholesale and retail trade; repair of vehicles and motorcycles, hospitality industry	Transportation and storage, IT and communications	Finance and insurance, real estate transactions	Professional expertise, R&D and engineering, administrative and support services	Public administration and military security, social security	Education	Healthcare and social services	Other economic activities
December 2019	72,425	3,852	1,760	10,586	1,955	450	4,983	13,052	7,325	2,929	4,283	5,317	7,049	5,733	3,153
December 2020	70,772	3,882	1,837	10,315	1,932	566	4,347	12,691	7,683	2,793	4,127	5,117	6,895	5,290	3,297
Size in 2020 as a % of 2019	97.7	100.8	104.4	97.4	98.8	125.8	87.2	97.2	104.9	95.4	96.4	96.2	97.8	92.3	104.6
2019 structure, %	100.0	5.3	2.4	14.6	2.7	0.6	6.9	18.0	10.1	4.0	5.9	7.3	9.7	7.9	4.4
2020 structure, %	100.0	5.5	2.6	14.6	2.7	0.8	6.1	17.9	10.9	3.9	5.8	7.2	9.7	7.5	4.7

Source: Rosstat.

workers. Employment in health care and social services decreased by 7.7 per cent (mainly due to services, although outflows from health care facilities during the pandemic were also observed in some regions) and employment in financial operations and real estate business decreased by 4.6 per cent. Employment in a "migrant" sector such as retail did not fall very significantly – by 2.8 per cent overall for the year, but during the lockdown in Q2 2020, layoffs in this industry were massive, with many people moving from retail to online shopping delivery services. In addition, the relatively insignificant reduction in demand for labour in the largest sector of the Russian economy -it is about 0.4 million people.

High growth of demand for labour – by 25.8 per cent, was observed in the "water supply, wastewater treatment, waste collection and disposal" sector, but in absolute terms, it was only an increase of 116,000 employees. Of the industries employing a large number of people, including migrants, transport grew significantly by 4.9 per cent and mining in total by 4.4 per cent.

Employment of Central Asian migrant workers in regions and sectors of the Russian economy

Three Central Asian countries - Uzbekistan, Tajikistan and Kyrgyzstan - remain the three largest countries of origin of migrants in the Russian Federation, despite the emerging trends and new directions of emigration from Central Asia to Turkey, the Republic of Korea and the Middle East. According to official Russian statistics based on the issuance of permits (patents and work permits) in the Russian Federation before the COVID-19 pandemic, in 2019, about 1,041,000 permits were issued to citizens of Uzbekistan and 498,000 to the citizens of Tajikistan. Citizens of Turkmenistan were issued 645 permits to work in the Russian Federation in 2019. Citizens of Kyrgyzstan and Kazakhstan are also present in Russian statistics in terms of obtaining patents and work permits but these cases are abnormalities given that these two states are members of the Eurasian Economic Union (EEU) and are thus not required to obtain work permits in the Russian Federation (Table 4.5). Citizens of these countries were thus lost in Russian migration statistics, so it is possible to estimate their numbers based on the correction factor (ratio of those registered at the place of residence to those who received patents or work permits – 4.5). Based on this, the number of citizens of Kyrgyzstan and Kazakhstan in the Russian Federation in 2019 would be 231,000 and 15,400 people, respectively, though anecdotal evidence suggests that this is also a significant under-calculation of the actual numbers.

In total, the number of documented migrant workers from Central Asia in the Russian labour market before the COVID-19 pandemic could be as high as 1,786,000. A large number of Central Asian migrant workers in

Table 4.5. Number of migrant workers who received work permits to work in the Russian Federation in 2017-2019

	Number of migrant workers who arrived during the year and obtained a work patent / work permit			Number of migrant workers with a work patent / work permit as of the year end		
	2017	2018	2019	2017	2018	2019
Total, people	1,679,102 / 94,800	1,675, 874 / 92,679	1,708,811 / 84,889	1,649,134 / 114,941	1,661,898 / 93,221	1,693,460 / 83,237
From Central Asian countries, people	1,439,335 / 447	1,466,960 / 438	1,538,694 / 1,002	1,410,066 / 13,661	1,452,465 / 12,606	1,523,094 / 13,092
Share of Central Asian countries, %	85.7% / 0.5%	87.5% / 0.5%	90% / 1.2%	85.5% / 11.9%	87.4% / 13.5%	89.9% / 15.7%
Uzbekistan	996,824 / 142	1,019,532 / 183	1,040,681 / 215	976,946 / 7,690	1,008,975 / 7,110	1,032,023 / 7,137
Tajikistan	442,321 / 72	447,274 / 103	497,947 / 138	432,769 / 4,392	443,202 / 4,090	490,955 / 4,097
Kyrgyzstan	95 / 0	76 / 0	39 / 0	128 / 1,132	143 / 1,118	64 / 1,115
Kazakhstan	95 / 11	78 / 7	27 / 4	223 / 157	145 / 146	52 / 139
Turkmenistan	0 / 222	0 / 145	0 / 645	0 / 290	0 / 142	0 / 604

Source: Monitoring of national labour markets of the CIS countries, 2016-2019 M.: The Interstate Statistical Committee of the Commonwealth of Independent States. 2020. C. 32. URL: *http://www.cisstat.com/rus/Monitoring_labour2016-2019.pdf* the Russian labour market do not have the necessary documents and work informally and are thus not captured in the official data. In particular, some migrants do not have residence registration, some do not have a written employment contract, some have not been notified by their employer to the General Directorate for Migration Issues of the Ministry of Interior of the Russian Federation, and some do not have a patent or have let it expire. Expert estimates indicate the presence of at least 750,000 undocumented migrants from Central Asian countries in the Russian Federation in 2021, including 332,000 from Uzbekistan, 247,000 from Tajikistan, 115,000 from Kyrgyzstan, and 49,000 from Kazakhstan.[4] Among them, the most noticeable share are migrants who stayed after the outbreak of the pandemic because employers promised to pay compensation but did not do so; as a result, many migrants who remained entered an undocumented situation as their permits expired and they had no money to leave the country. In large cities (Moscow, Saint Petersburg, Yekaterinburg), migrants were able to work – but at lower wages – and received some help from their compatriots. These migrants are now ready to regulate their status and continue working in the Russian Federation.

The numbers of both documented and undocumented migrants in the Russian Federation fluctuates and depends on several factors:

- first, the general economic situation in the countries of origin of migrants and the needs of employers in the Russian Federation;
- second, the procedure of entry into the Russian Federation, registration procedures and access to the Russian labour market;
- third, restrictions (“barriers”) to the employment of migrants, which are introduced by the Russian authorities to regulate the situation of the labour market (employment quotas by sectors of the economy, the price of a patent).

Often a different combination of these factors leads to the movement of migrants between regular and irregular statuses.

According to the General Directorate for Migration Issues of the Ministry of Internal Affairs of the Russian Federation, the number of registered migrants and migrant workers in the Russian Federation decreased by about half in 2020 due to the restrictions related to the COVID-19 pandemic (Table 4.6). Since the Russian Federation has halted scheduled air traffic since 20 March 2020 to prevent the spread of coronavirus, only charter (primarily outbound) flights were operated between countries, so many migrant workers were unable to leave the Russian Federation during the pandemic. Russian authorities have repeatedly extended the possibility for foreign nationals to stay in the country during the COVID-19 pandemic, including until 15 June 2020, until 25 December 2020, until 15 June 2021, and, most recently, until 30 September 2021. Naturally, under these conditions, the inflow of migrant workers to the Russian Federation from Central Asian countries has decreased sharply.

Only on 20 September 2020 were the borders opened for the citizens of Kazakhstan and Kyrgyzstan,[5] and from 01 April 2021 for the citizens of Tajikistan and Uzbekistan.[6] At the time of writing, citizens of Central Asian countries can re-enter the Russian Federation to work, visit and study. They must carry a negative PCR coronavirus test conducted no more than 72 hours before the flight, no other documents will be required, but only the “air gates” are open; entry by road and rail is still prohibited at the time of publication.[7]

In 2020, according to the data of the General Directorate for Migration Issues of the Ministry of Interior of the Russian Federation, 1.3 million foreign citizens worked in the Russian Federation on the basis of patents, 85,000 - based on work permits, 368,000 – under employment and civil law contracts as citizens of EEU countries. Additionally, about one million foreigners had a temporary residence permit or a residence permit and could work without special permits.[8] In January-April 2021, 360,000 patents were issued to foreign nationals in the Russian Federation, which is 36 per cent less than for the same period in 2020 (559,000 patents).[9]

Within the Russian Federation, migrant workers are unevenly distributed. Most are attracted to the Central Federal District (primarily including Moscow and the Moscow Region), the Northwestern Federal District (Saint Petersburg and the Leningrad Region), the Far Eastern and Volga Federal Districts. They are mainly concentrated in large cities and economic cent of the country. The key regions of the Russian Federation selected for the study have the most migrant workers in the country (Table 4.7).

[4] Labour migrants in The Russian Federation. Will illegal immigrants return to Uzbekistan? // DW News. 24 April 2021. URL: *https://www.dw.com/ru/trudovye-migranty-v-rossii-vernutsja-li-nelegaly-v-uzbekistan/a-57316327*

[5] Decree No. 2406-p. of the Government of the Russian Federation of 20 September 2020. URL: *http://www.consultant.ru/document/cons_doc_LAW_381297/0000000000000000000000000000000000000000/#dst100007*

[6] Decree No. 814-p. of the Government of the Russian Federation of 31 March 2021. URL: *http://www.consultant.ru/document/cons_doc_LAW_381297/0000000000000000000000000000000000000000/#dst100007*

[7] M. Yusufzoda, Sh. Abdullo, Government of the Russian Federation: Tajik citizens will only be allowed into Moscow with a negative PCR test // Radio Ozodi. URL: *https://rus.ozodi.org/a/31171574.html*

[8] The number of migrants in The Russian Federation has almost halved // Vedomosti. 16 December 2020. URL: *https://www.vedomosti.ru/society/news/2020/12/16/851122-rossii-pochti-vdvoe-sokratilos-chislo-migrantov*

[9] The number of new work patents for migrants in The Russian Federation decreased by 36% in 2021 // Report by TASS. 18 May 2021. URL: *https://tass.ru/obschestvo/11398771*

Table 4.6. Number of migrant workers in the Russian Federation registered at the place of stay in 2019-2021

	Number of migrants registered at the place of stay			Number of migrants registered at the place of stay for the purpose of work		
	2019	2020	2021 (January-June)	2019*	2020*	2021 (January-June)
Total	**18,951,004**	**9,340,798**	**4,972,497**	**5,478,249**	**2,358,827**	**3,654,462**
From Central Asian countries	9,504,176	6,409,267	3,538,920	3,881,448	1,772,962	2,971,637
Share of Central Asian countries, %	50.1	68.6	71.2	70.9	75.2	81.2
Uzbekistan	4,739,789	3,404,660	1,841,595	2,107,302	1,011,028	1,685,166
Tajikistan	2,652,867	1,829,270	1,017,505	1,179,423	507,255	828,125
Kyrgyzstan	1,039,374	722,880	456,085	453,702	190,312	384,833
Kazakhstan	692,840	368,619	199,584	136,208	60,461	70,199
Turkmenistan	121,848	83,838	24,151	4,813	3,906	3,314

Note: in 2019-2020, the data of the Ministry of Internal Affairs on the migrants, who were registered at the place of stay for the purpose of work, included only those migrants who were registered for the first time, while in 2021, they also included those who extended their registration during the year.

Source: The Ministry of Internal Affairs of the Russian Federation. Statistics on Migration. URL: *www.mvd.ru*

The majority of migrant workers from Central Asian countries (over 70%) are concentrated in six key regions of the Russian Federation (Table 4.8). In these regions, there is a similarly high concentration of citizens of Tajikistan (78%), Kyrgyzstan (70%) and Uzbekistan (69%).

In 2019, the Federal State Statistics Service (Rosstat) conducted the “2019 Migrant Labour Sample Survey”, which is compared to the results of the 2019 Labour Force Sample Survey (Table 4.9). These surveys are methodologically compatible, their data is comparable, and the number of labour migrants is presented by Rosstat as part of the labour force and employed population of the Russian Federation. Unlike other statistical sources (data series), where the number of migrants is estimated autonomously and is not linked to the numbers of the labour force and employed population. The number of migrant workers employed in the Russian economy in 2019 was estimated by Rosstat at 2.5 million people,

Table 4.7. Number of migrant workers in the key regions of the Russian Federation registered at the place of stay in 2019-2021, people

	Number of migrants registered at the place of stay			Number of migrants registered at the place of stay for the purpose of work		
	2019	2020	2021 (January-June)	2019*	2020*	2021 (January-June)
Total, people	18,951,004	9,340,798	4,972,497	5,478,249	2,358,827	3,654,462
Moscow	4,447,032	2,385,613	1,355,556	1,879,291	722,372	1,063,594
Moscow Region	1,665,414	1,085,609	580,895	493,878	185,763	431,757
Saint Petersburg and Leningrad Region	3,597,970	1,017,866	551,963	1,032,422	629,462	416,949
Sverdlovsk Region	363,590	192,382	98,905	126,845	40,641	70,722
Republic of Tatarstan	324,163	185,659	93,342	76,009	40,178	58,404
Republic of Bashkortostan	147,535	86,778	45,343	40,577	14,263	33,356

Note: in 2019-2020, the data of the Ministry of Internal Affairs on the migrants, who were registered at the place of stay for the purpose of work, included only those migrants who were registered for the first time, while in 2021, they also included those who extended their registration during the year.
Source: The Ministry of Internal Affairs of the Russian Federation. Statistics on Migration. URL: *www.mvd.ru*

Table 4.8. Number of migrant workers from Central Asia in the key regions of the Russian Federation registered at the place of stay for the first time in the 2020s, people

	Total	Central Asia	Uzbekistan	Tajikistan	Kyrgyzstan	Kazakhstan	Turkmenistan
Russian Federation	2,358,827	1,772,962	1,011,028	507,255	190,312	60,461	3,906
Moscow	722,372	500,065	234,302	172,346	81,543	10,418	1,456
Saint Petersburg and Leningrad Region	629,462	554,596	377,437	149,439	22,520	4,771	429
Moscow Region	185,763	128,036	56,717	51,042	16,585	3,435	257
Sverdlovsk Region	40,641	35,173	10,711	13,847	8,529	2,079	7
Republic of Tatarstan	40,178	30,515	18,926	7,103	3,113	1,279	94
Total for 6 key regions, people	1,618,416	1,248,385	698,093	393,777	132,290	21,982	2,243
Share of 6 key regions in the Russian Federation, %	68.6	70.4	69.1	77.6	69.5	36.4	57.4

Source: The Ministry of Internal Affairs of the Russian Federation.

Table 4.9. Distribution of working population and migrant workers in the Russian Federation by type of economic activity in 2019

	All working individuals	Including migrant workers	Migrant workers as a % of the working population
Total	71,064	2,570.2	3.6
by type of economic activity			
agriculture, forestry, hunting, fishing and fish farming	4,781	139.3	2.9
mining	1,153	65.1	5.6
manufacturing	9,963	295.5	3.0
electricity, gas and steam supply, air conditioning	1,607	46.4	2.9
water supply and discharge; waste collection and disposal, pollution elimination	701	13.9	2.0
construction	6,416	324.3	5.1
wholesale and retail trade; repair of vehicles and motorcycles	13,497	501.3	3.7
transportation and storage	5,373	241.8	4.5
hospitality industry	1,763	112.8	6.4
IT and communications	1,474	38.7	2.6
finance and insurance	1,369	43.5	3.2
real estate transactions	1,923	52.9	2.7
professional expertise, R&D and engineering	2,827	55.1	1.9
administrative and support services	1,963	61.9	3.2
public administration and military security, social security	3,627	90.8	2.5
education	5,393	180.3	3.3
healthcare and social services	4,400	177.4	4.0

activities associated with culture, sports, leisure and entertainment	1,136	47.4	4.2
other services	1,628	81.9	5.0

Source: Rosstat.

or 3.6 per cent of the total number of employees. The largest contingents of labour migrants are employed in trade, where they account for 3.7 per cent of workers, in construction – 5.1 per cent, in processing – 3 per cent, and in transport (including taxi drivers and couriers) – 4.5per cent. There are also "migrant" activities, where the absolute number of migrant workers is not as high, but their share is much higher than the average for the entire economy. These include hotels and catering companies – 6.4 per cent, mining and quarrying – 5.6 per cent, culture, sports, recreation and entertainment – 4.2 per cent, and health and social services – 4 per cent.

Certain transformations in the employment of migrant workers by economic sectors occurred during the COVID-19 pandemic. While employment in construction has temporarily decreased, the number of migrants employed in the delivery, courier, internet services, and taxi sectors has increased. As a result, representatives of taxi aggregators and food delivery services do not see an acute shortage of labour in the Russian labour market. According to the representative of Citi Mobile, although the pandemic has made its adjustments and many migrants have left the country, this has generally not affected the number of employees in taxi fleets. A spokesperson for the Delivery Club said: "We have no shortage of couriers, the service continues to gain clients, the need for workers is constantly increasing. We do not disclose the number of couriers, but we can absolutely say that we are not talking about any reduction. We completed two million orders in June 2019, 5 million in June 2020, and seven million in June 2021. Along with the increase in volume came a comparable increase in the number of couriers partnering with the platform." A Yandex Go spokesperson noted that the number of active couriers in service in 2021 is 3.5 times higher than in 2019. Interest in courier vacancies is not decreasing, on the contrary, it is going up.[10]

Natalya Danina, the Director of Analytical Business Solutions Department at HeadHunter, predicts: "A definite trend with the return of migrant workers may emerge in late Fall 2021, and before that the "flow" of those migrants who did not go home in the first wave will continue, from one profession to another - from construction workers to couriers and taxi drivers."[11]

The results of the sociological survey of employers revealed various motivations to recruit migrant workers from Central Asia in the Russian Federation. The demand for migrant workers from Central Asia is explained by employers from three perspectives:

- first, an objective factor is the structural characteristics of the workforce in the Russian Federation (there is a lack of Russian personnel with the necessary qualifications willing to work at the going salary rate – 52 per cent);
- second, characteristics of the workforce from countries of origin (quality work – 38 per cent, less costly for employers – 34 per cent, unpretentious living conditions – 34 per cent, less demanding working conditions – 32 per cent, willingness to work for less pay – 27 per cent, temporary employment – 15 per cent);

Table 4.10. Distribution of employers' answers to the question: "What are the reasons for your company (entity) to recruit migrant workers from Central Asia?" (multiple choice question) (findings of the sociological survey, N = 473 employers)

Reasons to recruit migrant workers	Number of employers	Share of responses, %
Lack of qualified workers in the Russian Federation	246	52%
Migrant workers work better	180	38%
Migrant workers cost less for the employer	161	34%
Migrant workers are less picky about their living conditions	161	34%
Migrant workers are less picky about their working conditions	151	32%
Migrant workers are willing to work for less pay	128	27%
Migrant workers can be hired temporarily	71	15%
No need to pay social security contributions for migrant workers	62	13%

[10] Migrant workforce shortage leads to higher pay for laborers // RBC. 23 August 2021. URL: *https://www.rbc.ru/technology_and_media/23/08/2021/611fa69d9a7947f545ce3f5c*

[11] Migrant workforce shortage leads to higher pay for laborers // RBC. 23 August 2021. URL: *https://www.rbc.ru/technology_and_media/23/08/2021/611fa69d9a7947f545ce3f5c*

- third, the reluctance of some employers to fully comply with labour legislation persists (primarily due to a desire to reduce labour costs by saving on social contributions – 13 per cent).

In the in-depth interviews, experts mentioned competitive advantages of workers from Central Asia such as 'readiness to work hard, sometimes without days off,' 'result-oriented,' 'eager to make money,' 'do not drink alcohol,' 'do not push for their rights.' In this regard, migrant workers from Central Asia are viewed by employers in the Russian Federation as more competitive compared to Russian workers, first of all in the segment of in-demand jobs. However, it should be noted that most employers in the Russian Federation indicated the competitive advantages of hiring Central Asian workers derived not from the skill of the workers but based on their willingness to take on working conditions and salaries below those demanded by the local labour force, thus reducing the value of skills development of migrant workers from the perspective of employers.

According to the findings of the sociological survey, the share of workers from Central Asia in businesses that employ migrant workers include microbusinesses (up to 15 people) – 64 per cent of the workforce, in small businesses (15-100 people) – 32 per cent, in midsized business (100-250 people) – 31 per cent, in large businesses (over 250 people) – 16 per cent.

Interview with representative of MALINO Group HR Department (Moscow region)

The main competitive advantage of migrant workers is probably, so to say, low pretentiousness. Let's call it that. One can list their qualities as follows: they are less demanding of living conditions, they do not expect inflated wages, speaking slang "they do not push for their rights", they try to resolve conflict situations through negotiations, which are often led by their foreman between the company management and guest workers. I mean, they're very, very hardworking and diligent, and that's important. It's such a national trait. This doesn't surprise me, because I grew up in Central Asia, and I consider Tashkent my hometown. So, I understand people from Uzbekistan who come to work for us, I understand what their national, social and cultural traits are. It is fair to add that there are different people among citizens of Uzbekistan and Tajikistan, who can be corrupted by one factor or another. I would like to add that migrant workers understand that they are coming here to earn money. Therefore, they are focused on the performance of labour duties in principle. They understand that they have arrived, and they should efficiently spend the time that they have here. Through this they are more beneficial for the employer.

The socio-demographic charactertistics of migrant labour inflow from Central Asia are highly differentiated across employers. The first aspect involves significant differences between migrants from big cities and rural areas: it has been noted by many respondents that workers from Tashkent (Uzbekistan), Sughd Province of Tajikistan, Bishkek (Kyrgyzstan) substantially outperform those from rural areas due to higher levels of education and technical skills.

The second aspect is associated with citizenship of migrants. According to the findings of the sociological survey of employers, it is easier to recruit and enroll the citizens of Kazakhstan and Kyrgyzstan (part of EEU). Command of Russian along with high qualifications contribute to the higher demand for Kazakh citizens in the segments of qualified and highly qualified labour. Migrants from Uzbekistan and Tajikistan are generally of larger demand in occupations requiring low or medium level qualification.

The third aspect is associated with socio-demographics: older people (40+) have a better command of Russian, mentality resonating with the Russians, and an acceptable level of qualification adequate for Russian environment. Meanwhile, younger people (18–30), who grew up in independent states, have a poorer knowledge of Russian, no longer 'share' the mentality', and their qualifications are not always consistent with the Russian requirements. Some experts in their in-depth interviews stated that qualified personnel (welders) in Uzbekistan already undergo training based on Western standards and systems rather than according to Russian techniques and norms. With the outbreak of the pandemic, salaries in the Russian Federation, particularly within lower skilled work, have increased due to the shortage of labour which almost eliminated the competitive advantage of migrant workers from Central Asia in the eyes of the employers in the Russian Federation, (their low cost) as demand for certain products/services declined as they became more costly. According to Marat Khusnullin, Deputy Prime Minister: "The current situation with migrants and labour resources is becoming … catastrophic. The cost of labour resources has increased by 50–100 per cent. At that, let alone money, we literally do not have people, who can perform the construction work." [12]

Current needs of employers for migrant workers in key sectors of the Russian economy

Employers in the Russian Federation are struggling with a severe shortage of labour arising, on the one hand, from the specific factor of Russian people not being willing to take on certain types of work and working conditions at current salary rates (most Russians are not ready to take up low-paid, non-prestigious or labour-intensive work), despite a slight increase in working-age population and, on the other hand, from the force majeure reduction in foreign migrant labour inflow caused by the closure of Russian borders to prevent the spread of COVID-19. This problem has been recognized and repeatedly voiced

[12] Хуснуллин: ситуация с мигрантами на стройке становится катастрофической // Петербургский экономический форум. 03.06.2021. URL: *https://realty.ria.ru/20210603/migranty-1735409644.html*

Table 4.11. Distribution of employers' answers to the question: "What are the professions of the Central Asian migrant workers employed by your company (entity)" multiple choice question (findings of the sociological survey, N = 473 employers)

Type of company (entity)	Professions
Microbusinesses	Sales assistant, waiter, driver, courier, security guard, hairdresser (barber), baker, cleaner, seamstress/tailor
Small businesses	Assistant worker, metalworker, roofer, installation fitter, welder, ironworker, finisher, electrician, tiler, concrete worker
Medium businesses	Assistant worker, general worker, reinforced concrete builder, welder, installation fitter, excavator operator, crane operator, electrician, painter finisher, drywall installer, roofer, assembling fitter, packager
Large businesses	Assistant worker, installation fitter, tiler, metalworker, driver, concrete worker, crane operator, gas welder, driver, programmer

at various levels. For example, in September 2021 Sergey Lavrov, Foreign Minister of the Russian Federation said: "We need labour migrants. It is important for our economy. Without migrant workers, many industries are currently experiencing significant staffing shortages. We are trying to make their arrival here as clear, transparent, and legitimate as possible. To this end, we negotiate with countries from which migrants tend to come to us on a permanent basis (often with Central Asian countries) to organize special courses that will ensure they have a basic knowledge of the Russian language, Russian customs, our laws, and understand how a person should behave if they are hired in the Russian Federation."[13]

According to Anton Glouchkov, the President of the National Association of Builders (NOSTROI), because of the COVID-19 pandemic, the construction industry in the Russian Federation has lost foreign workers: "The outflow of migrants was 1.5 million people, which means we lost one in five construction workers."[14] In March 2020, Marat Khusnullin, Deputy Prime Minister said: "There is a 1.5-2 million worker labour shortage in the country today in construction alone. Workers' wages went up by 50 per cent because of the shortage and, in some places, by twice as much. But even at twice the salary, it is extremely difficult to get people. We believe this is one of the main constraints for the development of construction".[15]

The shortage of tilers, window installers and other handymen on the Russian labour market since the start of the COVID-19 pandemic has only intensified, leading to an increase in the average wage of these workers. According to HeadHunter, desired wages among low-skilled employees increased by 15 per cent on average. Natalya Ilchenko, head of Superjob press service: "The departure of migrants provoked competition for workers and raised wages in construction by 9.8 per cent in the first six months of 2021 and by 15.8 per cent for the year (without inflation). In some occupations, the increase was even greater. During the year of the pandemic, the average wage of tilers in Moscow rose by more than 40 per cent, PVC window installers by more than a quarter, and slingers and electric and gas welders by more than 20 per cent. The number of vacancies in the construction industry increased by 210 per cent, while the number of CVs increased by a mere 7 per cent. The competition for a vacancy has dropped by almost 2.7 times."[16]

In August 2021, Aleksandr Lomakin, First Deputy Minister of Construction, estimated the shortage of workers at 3 million people. Marat Khusnullin, Deputy Prime Minister, who supervises the construction complex, estimated the volume of human resources that will have to be attracted to the Russian construction sector until 2024 at 5 million people.[17]

At the end of 2020, according to the Ministry of Construction of the Russian Federation, in 50 regions of the country, there was a shortage of migrant workers at construction sites.[18] In June 2021, Vladimir Efimov, Deputy Mayor of Moscow on Economic Policy and Property and Land Relations, claimed that the capital is short of 300,000 workers or 30 per cent of the required number of migrants: "In the construction industry, the

[13] Sergey Lavrov: The Russian Federation needs labour migrants // MIGRANTY.ORG. 03 September 2021. URL: *https://migranty.org/novosti/sergej-lavrov-rossija-nuzhdaetsja-v-trudovyh-migrantah/?fbclid=IwAR3RefhuMgFJM9pmmCNBtoOtiu58imGpiFBLvGuAqLYfWsj7IBVtkjPzcfc*

[14] NOSTROI proposes to create a register of migrant builders // Real Estate. RIA Novosti. 22 April 2021. URL: *https://realty.ria.ru/20210422/migranty-1729330901.html?in=t*

[15] Khusnullin said labour shortage… // Report by TASS. 27 March 2021. URL: *https://tass.ru/nedvizhimost/11009647*

[16] Migrant workforce shortage leads to higher pay for laborers // RBC. 23 August 2021. URL: *https://www.rbc.ru/technology_and_media/23/08/2021/611fa69d9a7947f545ce3f5c*

[17] The Russian Federation plans to bring from Uzbekistan… // NA Podrobno.uz. 03 September 2021. URL: *https://podrobno.uz/cat/uzbekistan-i-rossiya-dialog-partnerov-/rossiya-nameren-vyvezti-iz-uzbekistana-okolo-10-tysyach-migrantov-charternymi-poezdami-v-proekte-uch/?fbclid=IwAR3-u06YMqEUgDE628INCOLzedLVsy7A1TqILkyRI4ZIi1FLhw5rBdkZKRI*

[18] The number of migrants in The Russian Federation has almost halved // Vedomosti. 16 December 2020. URL: *https://www.vedomosti.ru/society/news/2020/12/16/851122-rossii-pochti-vdvoe-sokratilos-chislo-migrantov*

labour problem is growing. Normally we have about a million migrant workers employed in the city, but today we have about 700,000 of them, which means the economy is still short of about 300,000 people. Some of them work in construction, some work in the housing and utilities sector, and some work in all the other sectors that involve migrant labour. Given that the vast majority of our industries have recovered, this is the kind of workforce the city needs."[19]

Anton Borisenko, General Director of "City - XXI century" notes: "The bulk of construction work is carried out by specialists from CIS countries and therefore the shortage of labour is quite tangible, which affects the pace of construction work. In order to meet deadlines, the company has to optimize the time contractors spend on construction and installation processes, increase the number of shifts for silent work and the number of contractors with their own workforce."[20]

Andrey Ivanenko, Managing Director of Samolet Group, said: "The company's facilities are stably supplied with manpower but if there is a need to quickly increase the number of employees, it is not always possible to solve this problem even in a few weeks. The increase in wages has averaged 15 per cent since the beginning of the pandemic but has not had as noticeable an effect on the cost of construction as the increase in the cost of construction materials."[21]

Experts during in-depth interviews noted that the need for labour is most acute in construction, agriculture, retail, logistics (loading and unloading), light industry in Moscow, the Moscow Region, Saint Petersburg, Novosibirsk, and Samara. One of the experts estimated the total country-wide need in the workforce in June 2021 at 800,000-1,000,000 people. According to expert estimates, the highest demand is now attributable to construction, agriculture, road construction, the hospitality sector and logistics.

Yet, based on the information published in 'Employment of migrant workers' section on Trudvsem.ru, as of 09 June 2021, the employers in the Russian Federation only need 86,295 foreign migrant workers, considering that not all employers are publishing their vacancies through official channels. The jobs of highest demand in the Russian Federation include concrete workers, steel fixers, laborers, carpenters, plasterers, house painters, erecting personnel, brick layers, industrial pipefitters, and shutter installers.

By mid-summer 2021, 128 employers from Moscow and the Moscow Region, the Murmansk and Leningrad Regions, the Republic of Bashkortostan and Khabarovsk Krai had applied to participate in international recruitment programs.[22] In September 2021, Nikita Stasishin, Deputy Minister of Construction and Housing said: "Dozens of companies have already applied for migrant construction workers from abroad to be brought into the Russian Federation centrally by charter trains and planes. Among the applicants are the IT company Yandex, in particular its division that builds logistics warehouses; the infrastructure construction company Velesstroy; several large housing construction companies and companies that build the Vostochny space-vehicle launching site. In pilot mode, it is planned to bring 10,000 people[23]. The idea of launching charter trains for workers from Central Asian countries is also supported by the Ministry of Agriculture. Russian Railways declares that it is ready to provide such transportation, subject to making the relevant decision and determining the transportation customer in order to conclude a contract.

According to the findings of the sociological survey, in key regions of the Russian Federation, before the end of 2021, 53 per cent of employers will see an increased demand for foreign workers, for 35 per cent the demand will not change, and for 12 per cent the demand will go down. In the medium term (next two-three years), 65 per cent of the surveyed employers will have an increase in demand for labour, 27 per cent do not expect a change, and 8 per cent forecast a decline (Table 4.12).

The sociological survey proved that labour requirements depend much on the type of enterprise. Small and midsized businesses are also facing a shortage of labour, although a smaller one. According to the findings of the sociological survey, on average: microbusinesses (up to 15 people) have 2 job openings, small businesses (15-100 people) - 4 job openings, midsized businesses (100-250 people) - 11 job openings, large businesses (over 250 people) - 244 job openings. The largest number of job openings is reported by KAMAZ LLC in the Republic of Tatarstan (around 2,000) and CROST-D LLC in Moscow (around 1,500). The labour shortage is becoming a threat to the Russian economy and could slow down the economic growth in 2021.

[19] Moscow is short of 300,000 labour migrants, according to the authorities // RIA Novosti. 03 June 2021. URL: *https://realty.ria.ru/20210603/migranty-1735362078.html*

[20] Migrant workforce shortage leads to higher pay for laborers // RBC. 23 August 2021. URL: *https://www.rbc.ru/technology_and_media/23/08/2021/611fa69d9a7947f545ce3f5c*

[21] Migrant workforce shortage leads to higher pay for laborers // RBC. 23 August 2021. URL: *https://www.rbc.ru/technology_and_media/23/08/2021/611fa69d9a7947f545ce3f5c*

[22] Y.u Pakina. We hire migrants from Tajikistan under the organized recruitment framework // Migration expert. 15 July 2021. URL: *https://all-migration.com/journal/trudoustroystvo-inostrantsa-oformlyaem-pravilno/prinimaem-po-orgnaboru-inostrantsev-iz-tadzhikistana/*

[23] The Russian Federation plans to bring from Uzbekistan… // NA Podrobno.uz. 03 September 2021. URL: *https://podrobno.uz/cat/uzbekistan-i-rossiya-dialog-partnerov-/rossiya-nameren-vyvezti-iz-uzbekistana-okolo-10-tysyach-migrantov-charternymi-poezdami-v-proekte-uch/?fbclid=IwAR3-u06YMqEUgDE628INCOLzedLVsy7A1TqILkyRI4ZIi1FLhw5rBdkZKRI*

Table 4.12. Distribution of employers' answers to the questions related to changes in a company's (entity's) headcount and demand for human resources (findings of the sociological survey, N = 473 employers)

Trends in headcount and demand for human resources	Increased	Decreased	Remained the same
In your company (entity), how did the COVID-19 restrictions in 2020-2021 effect the number of migrant workers from Central Asian?	7%	50%	43%
What is your forecast of how your company's (entity's) demand for human resources will change by the end of 2021?	53%	12%	35%
What is your forecast of how your company's (entity's) demand for human resources will change in two-three years?	65%	8%	27%

The findings of the sociological survey of employers confirm that the most needed trades include that of welders, mechanics, drivers, fitters, laborers across all industries (Table 4.13).

According to the sociological survey of employers, 3/4 of employers (76%) try to find workers in the regional labour market. Yet, many experts and employers claim that it is often extremely hard to find a local, Russian national worker for certain types of work and salaries. In almost 1/3 of the cases (29%), employers seek to find workers specifically from Central Asia, which have become the most accessible labour force in the Russian market over recent years (Table 4.14).

Given these growing dynamics, it is no wonder that recruitment from Central Asia is becoming more prominent among employers in recent years: 2002-2005 – 5 per cent, 2006-2010 – 16 per cent, 2011-2015 – 34 per cent, 2016-2020 – 45 per cent (Table 4.15).

According to HeadHunter, in H1 2021, the number

Table 4.13. Distribution of employers' answers to the question: "What professions does your company (entity) currently seek most?" multiple choice question (findings of the sociological survey, N = 473 employers)

Company's (entity's) industry	Most sought-after occupations
Construction	Ironworkers, roofers, welders, electricians, general workers, estimators-measurers, structural workers, plasterers, milling-machine operators, electric and gas welders
Industrial production	Baker, carpenter, installation fitters, movers, molders, welders, cleaners, general workers, drivers, batch makers, tailors
Agriculture	Farm machinery operators, tractor drivers, cattle farm workers, assistant workers, drivers, milkers, metalworkers
Trading, catering, hotel business	Sales assistant, waiter, baker, driver, barman, cleaner, dishwashing maid
Transport, passenger and freight transportation	Drivers of different categories, courier, conductor, cleaner
Other industries	Driver, batch maker, assistant worker, hairstylist, street sweeper, balancer, installation fitter

Table 4.14. Distribution of employers' answers to the question: "Where does your company (entity) currently recruit geographically?" (multiple choice question) (findings of the sociological survey, N = 473 employers)

Geography of priority recruitment for job openings	Number of employers	Share of responses, %
Home region	359	76%
Central Asian countries	137	29%
Other regions of the Russian Federation	118	25%
Abroad	57	12%

Table 4.15. Distribution of employers' answers to the question: "When did your company (entity) start to recruit migrant workers from Central Asia?" (findings of the sociological survey, N = 473 employers)

Start of migrant workers' recruitment	Number of employers	Share of responses, %
2002-2005	24	5%
2006-2010	76	16%
2011-2015	161	34%
2016-2020	212	45%

of résumés from Central Asian candidates has practically not changed compared to the same period in 2020, but the number of job openings in professional occupations performed mostly by migrant workers has increased. As a result, competition for job openings among workers engaged in production, construction, transportation, has been reduced to 1-2 people per vacancy from 2-5 in 2020.[24]

Natalya Danina, the Director of Analytical Business Solutions Department at HeadHunter, states: 'In the Russian labour market, the increase was only attributed to résumés from Kazakhstan and Belarus. Most often, candidates from these countries pursue white collar jobs and can work remotely, while operating, construction workers and service personnel are usually hired from Central Asia. The first wave of the pandemic led to a decrease in the migration inflow from Central Asia, workers began to return to their home countries, so the trend reversal (more résumés) in the summer of 2021 has not occurred yet. A 2 per cent increase in the number of résumés from Central Asia only means that the 2020 outflow of migrants has just been offset. Regular flights between the Russian Federation and Central Asia resumed only in April 2021 and in May, the third wave of COVID began'.[25]

In H1 2021, the demand for laborers increased, while the shortage of migrant workers emerging with the outbreak of COVID-19 is still ongoing. Managing Director at Avito Jobs, Artem Kympel, says:

Lately, the shortage of unqualified workforce is felt across many industries, most affected being the housing and utilities, construction and agriculture. Retail, catering, consumer services, taxi and delivery companies also report a shortage of operating personnel. In 2020-2021, the number of job openings in transportation and logistics rose by 136 per cent, in construction - by 104 per cent, production - by 127 per cent. Migrant workers are most often employed by developers as employers get certain quotas for migrant labour. According to Avito Jobs, in the past two years, candidates were twice as likely to respond to job openings in construction. As a rule, they list the simplest occupations in the résumés which do not require an academic degree or special skills. However, there are instances when workers change jobs due to hard working conditions. Having arrived in the country and obtained a permit, they can now choose better paid or less physically intensive job offers.[26]

During in-depth interviews, experts stated that it is more realistic and practical to determine the requirement for labour at the level of businesses and organizations, especially in the SME segment. Generally, on a country-wide level, the requirement can be estimated but with a breakdown into large employers and in a more flexible format. Therefore, most experts recognize the existence of migrant labour quotas for workers from visa-restricted countries as ineffective and not reflecting the real requirement in the labour market. The assessment of requirement for migrant labour depends heavily on the specific industry, seasonality, existence of a development plan in the company, potential for being awarded contracts and availability of funds to finance business development. In agriculture, planning the requirement for workers and migrant labour depends much on the sowing and harvesting campaigns. In construction, planning relies heavily on awarded contracts.

Forecasted employment rate and workforce requirement, including migrant workers, broken down by key regions within the Russian Federation, up to 2025

The employment rate was forecasted using the labour resource balance method. Under this method, the inflow of labour (supply) is first estimated based on the official working-age population count forecast (Rosstat), and then on 'utilization', namely, the requirement for workforce based on official GDP and productivity growth forecasts (Russian Ministry of Economic Development and departments of economics in the Russian regions). Further mapping of these values makes it possible to estimate the prospective unemployment rate. The long-term requirement for migrant workers is estimated on the basis of their presence in various industries and

[24] Migrant workforce shortage leads to higher pay for laborers // RBC. 23 August 2021. URL: *https://www.rbc.ru/technology_and_media/23/08/2021/611fa69d9a7947f545ce3f5c*

[25] Migrant workforce shortage leads to higher pay for laborers // RBC. 23 August 2021. URL: *https://www.rbc.ru/technology_and_media/23/08/2021/611fa69d9a7947f545ce3f5c*

[26] Migrant workforce shortage leads to higher pay for laborers // RBC. 23 August 2021. URL: *https://www.rbc.ru/technology_and_media/23/08/2021/611fa69d9a7947f545ce3f5c*

extrapolation of industry-specific employment patterns for such a future period for each region.

The forecast is presented in table 4.16. The labour and employment forecasting methodology is based on the reporting data from Rosstat's labour force survey, which, in turn, relies on household surveys. That is why daily mass mobility of workers across the borders of megacities (pendulum migration) is not considered here.

According to Rosstat data for 2020 and our forecast up to 2025, the headcount of migrant workers in the Russian Federation and the key regions will continue to recover in 2021, while unemployment rates will return to the 2019 level. Then, depending on the GDP-GRP and labour productivity growth rates by economic activity (industry), the number of jobs (market requirement for labour) will grow at a slightly slower pace than labour resources and workforce. The forecast assumes a small lag in the increase of jobs vs the labour force size driven by the raised working age limits, which could cause the unemployment rate to go up again.

Table 4.16. The count of labour force, employed individuals, unemployed and employed migrant workers up to 2025

	Labour force, thousand people		Employed individuals, thousand people		The number of unemployed estimated using the labour force survey methodology (International Labour Organization), thousand people		Unemployment rate, % of labour force		Employment of migrant workers, thousand people	
	2020	2025	2020	2025	2020	2025	2020	2025	2019[1]	2025
Russian Federation	74,923	76,460	70,464	72,349	4,580	4,111	6.1	5.4	2,570	2,617
Moscow	7,295	7,530	7,032	7,498	263	32	3.6	0.4	405	450
Moscow Region	4,140	4,376	3,969	4,100	171	276	4.1	6.3	160	275
Saint Petersburg	3,108	3,255	2,997	3,119	112	136	3.6	4.2	38	114
Leningrad Region	987	1,195	928	1,100	59	95	6.0	7.9	54	60
Republic of Tatarstan	2,026	2,070	1,955	1,993	71	77	3.5	3.7	31	72
Sverdlovsk Region	2,110	2,190	1,991	2,078	118	112	5.6	5.1	91	100
Total for 6 key regions	19,666	20,616	18,872	19,888	794	728	4.0	3.5	779	1,071
Total for 6 key regions as a % from the Russian Federation	26.2	27.0	26.8	27.5	17.3	17.7			30.3	40.9
For reference:										
Moscow and Moscow Region	11,435	11,906	11,001	11,598	434	308	3.8	2.6	565	725
Saint Petersburg and Leningrad Region	4,095	4,450	3,925	4,219	171	231	4.2	5.2	92	174

Source of 2020 data – Rosstat

According to labour force surveys (LFS) as of December 2020, regular inflow of pendulum labour migrants to Moscow totaled 1,442,000 people, to Saint Petersburg - 206,000 people. If they are not recorded on the balance sheet, the unemployment rates are overstated for Moscow and Leningrad regions and understated for the capital cities. To offset this effect, we have also calculated the numbers for Moscow, Saint Petersburg and adjacent regions to make the forecasts more accurate.

In 2025, the total count of unemployed individuals and unemployment rate in percentage from the crisis-struck 2020 will generally reduce for the Russian Federation, Moscow and Sverdlovsk regions. In other key regions, the unemployment rate could potentially go up. However, the likelihood of this could be offset through economic development incentives and new jobs in these regions. In 2020–2025, the concentration of Russian labour force will get even higher in the key regions whose share will increase from 26.2 per cent to 27 per cent through the influence of demographic processes, including internal migration. Basically, it is the accelerated increase in population and labour force in these regions that will drive stabilization or a slight rise in unemployment in some of these regions.

A shift in the requirement for foreign workers will be associated with the general economic growth, especially in those industries which are now heavily dependent on migrant workers. Therefore, based on the economic growth rates and employment pattern, we believe that the requirement for the Russian Federation as a whole will increase and exceed 2.6 million people. The highest absolute increase in jobs for migrant workers will take place in the macro regions of 'Moscow and Moscow region' and 'Saint Petersburg and Leningrad region'. Generally, in the key regions, the concentration of migrant workers may rise from 30.3 per cent in 2019 to 40.9 per cent in 2025.

ii. Labour migration in Kazakhstan

Economic and demographic background

After the economic decline in 2020 caused by the COVID-19 pandemic, in Q2 2021 experts of the Centre for the Development of Labour Resources (CDLR) note the economic recovery in all key parameters. The count of employed workers has gone up by 1.2 per cent or 101,300 people over a year and, additionally, there is a major increase in self-employment rates other than wage labour. Unemployment, both general and youth, remains stable: 4.9 per cent and 3.7[27]per cent.

The Kazakh government acts to restrict foreign access to the labour market in order to protect the national labour market and workers. The regulations for bringing in a foreign workforce are designed to maximize utilization of local labour resources and attract predominantly skilled workers which meet the qualification requirements established by the government and which are intended to be responsive to labour market needs.

According to CDLR, the Electronic Labour Exchange (hereinafter – ELX) has seen a rising demand for workers. In January 2021, 60,400 job openings were posted on ELX, in February – 65,700, that is up by 9[28] per cent. The largest occupational demands are chiefly for agricultural workers and lower skilled labour: there are 245 résumés per 100 job openings in agriculture and 180 résumés per 100 job openings in other lower skilled occupations. The workforce shortage is reported in manufacturing, construction, transportation and production equipment operation. In these occupations, the demand is double that of the supply. Moreover, there exists a shortage of executives as well as service and sales staff: per 100 job openings, 74 and 68 résumés, respectively.

According to CDLR, in the skilled labour segment there is a shortage of kindergarten teachers, bus drivers, middle grade medical staff and caretakers. Among lower skilled occupations, there is a shortage of drydock workers, janitors, housekeepers in hotels and similar organizations, agricultural and food preparation assistants. Strong competition is observed among maintenance staff, yard keepers, carriers, general-duty laborers, and solid waste sorters.

On a regional level, most job openings were posted by companies and plants in Nur-Sultan (7,600 or 11.6% of the total amount), Karaganda (7,000 or 10.7%), Kostanay (6,900 or 10.6%) regions, and Almaty (6,300 or 9.6%). The least number of jobs were offered in Kyzylorda (1,400 or 2.2%) and North Kazakhstan (1,700 or 2.5%).

The current labour demand in Kazakhstan by industry is influenced primarily by the following factors:

- Changing labour demand across industries which, on the one hand, is driven by newly created jobs and, on the other hand, by the need to replace outgoing staff (due to retirement or other reasons). It is also necessary to account for foreign workers replacing the locals and check whether there are potential candidates for jobs from the local population (match the total number of résumés for Kazakhstan and the region against the hired migrant workers count by occupation and industry).
- Taking into account the impact of COVID-19 limitations leading to both general reduction of jobs in certain industries (recreation, entertainment) and part-time employment (inability to work on Sundays, shorter working days due to quarantine). At the same time, this facilitates the development of different forms of employment such as remote work (from home) and freelance; self-employment is also on the rise.
- In terms of personnel training there is a need to assess whether the local professional development system (on the job, involving local staff) is keeping pace with addressing the demand in various industries for certain occupations (workers having the qualifications, skills and competencies in demand) and to determine any structural imbalances within certain occupations.

The demographic situation in Kazakhstan is characterized by positive population dynamics. Over the past five years, from 2016 to 2021, the population increased from 17,670,000 to 19,010,000 people. The

[27] URL: *https://iac.enbek.kz/ru/node/1172*

[28] URL: *https://iac.enbek.kz/ru/node/103405.03.2021*

Figure 4.3. Demographic imbalance in the regions of Kazakhstan

national population remains unevenly distributed among regions. UNFPA experts note that, during the period of Kazakhstan's independence, there has been a major increase in the population in southern and western regions. While the central, northern and eastern regions have suffered a dramatic population decline over the same period.[29] The northern macroregion, including Akmola, Kostanay, and Northern Kazakhstan regions, account for only 11 per cent of the national population. The Central and Eastern macroregions (Pavlodar, Karaganda, and Eastern Kazakhstan regions) – 19 per cent, the Western macroregion (Atyrau, Mangystau, Aktobe, Western Kazakhstan) account for 16 per cent. The most populous is the Southern macroregion (Almaty, Jambyl, Turkistan, and Kyzylorda regions) with 32 per cent of the population. The degree of urbanization is high in the country's three major cities: Nur-Sultan, Almaty, and Shymkent.

The demographic trends have resulted in labour shortages in the northern regions and surpluses in southern regions. To overcome the imbalance, the Kazakh government has taken special measures to aid labour mobility and productive employment. A special segment of the Enbek State Program (2017-2021) seeks to promote labour migration from the southern to the northern regions of the country in order to address these demographic imbalances and labour market gaps.[30]

Labour migrant employment in Kazakhstan

The key economic industries of Kazakhstan traditionally employing foreign migrants are presented in Figure 4.4.

Employers in Kazakhstan primarily hire migrant workers in construction (engineers, skilled and semi-skilled labour), including predominantly in the city of Nur-Sultan; agriculture (mostly seasonal labour) most often recruits foreign workers to Turkistan and Almaty regions from Uzbekistan and Kyrgyzstan; administrative and maintenance services (specialists and executives employed via recruitment agencies for other industries); mining; professional, science, engineering, and manufacturing industries. In Almaty, the majority of migrant workers are employed in the service industry (trade, hospitality, catering). The Eastern Kazakhstan and Pavlodar regions employ mainly medium-skilled migrant workers in manufacturing and construction. In the North Kazakhstan region, there is a relatively small number of migrant workers, because residents of the neighboring regions of the Russian Federation (Omsk, Kurgan, Chelyabinsk), who do not require a special work permit, are able to commute in the region for work.

In 2020, on the back of production declines resulting from the COVID-19 containment measures, to safeguard the domestic labour market and preserve jobs for Kazakh citizens, quotas for migrant workers were cut by 40 per cent compared to 2019, yet still supported the employers' demand in scarce occupations. In 2020, the local executive agencies issued and extended 17,300 permits allowing employers to engage foreign workers (amounting to only 59 per cent of the approved quotas).

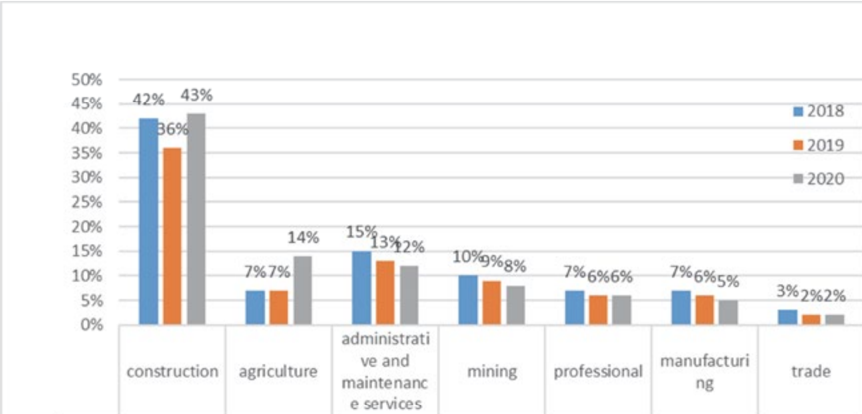
Following the state of emergency and quarantine in Kazakhstan during March-May 2020, due to the COVID-19 pandemic, the number of permits in certain industries reduced. Consequently, reduced quotas led to fewer migrant workers employed in such industries as agriculture (-2.3%), mining (-1.2%), professional, science & engineering (-1.5%) and process manufacturing (-4.6%). An opposite trend occurred in construction (+5.3%) where most of the projects are being implemented as usual, despite the pandemic.

Annual quotas for migrant workers coming to Kazakhstan, based on employers' requirement for 2021,

[29] We are Kazakhstan. Population Situation Analysis. UNFPA, Kazakhstan. URL: *https://stat.gov.kz/*

[30] URL: *https://adilet.zan.kz/rus/docs/P1800000746*

Figure 4.4. Labour migrant employment in Kazakhstan

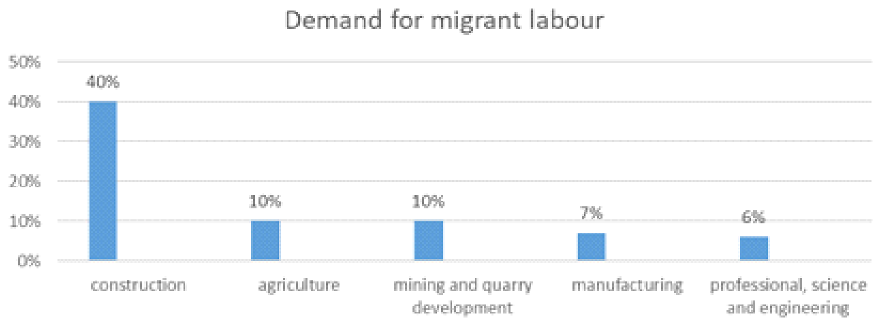


	construction	agriculture	administrative and maintenance services	mining	professional	manufacturing	trade
2018	42%	7%	15%	10%	7%	7%	3%
2019	36%	7%	13%	9%	6%	6%	2%
2020	43%	14%	12%	8%	6%	5%	2%

totaled 0.31 per cent of the labour force size in the country or 29,300 people.

According to the data as of 01 May 2021, the highest demand for migrant labour is attributed to construction (6,214 people, or 40% of all permit-holding migrant workers), agriculture (1,671 people or 10%, mining and quarry development (1,614 people or 10%), manufacturing (1,203 people or 7%) and professional, science and engineering (1,013 people or 6%). In total, these industries employ 73 per cent of all migrant workers in Kazakhstan.

Figure 4.5. Demand for Migrant Workers



As of 01 August 2021, the local executive authorities have issued 15,786 permits for migrants arriving in Kazakhstan, including categories such as executives and deputies - 661 people (4%); business unit leaders – 3,283 people (20%); specialists – 7,619 people (48%); skilled workers – 384 people (2%); seasonal workers – 1,952 people (12%); inter-company transfers – 1,887 people (11%). 1,801 businesses employ migrant workers who account for 4 per cent of total labour force size. 96 per cent are Kazakhstan citizens.

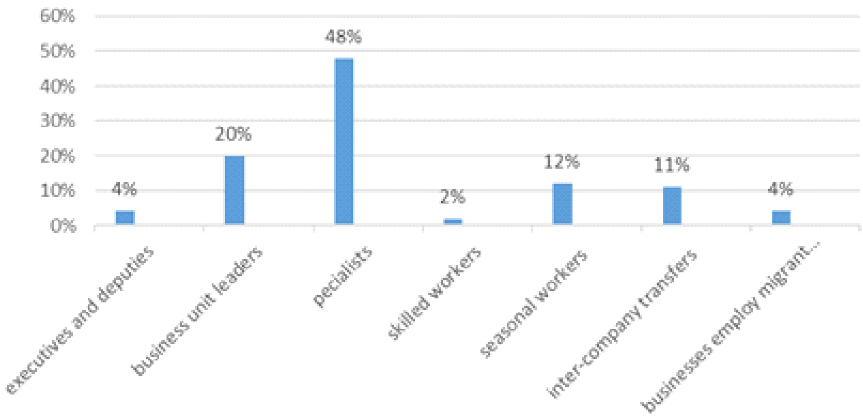
The analysis of Enbek.kz (ELX) reveals that, despite the availability of locals looking for jobs, the tendency for engaging migrant labour still persists. In most cases, the reason for this is that Kazak workers are not meeting the employer's requirements either in terms of skills or salary expectations.[31]

Among the engaged migrant workers, the prevailing occupations are engineers, lower skilled workers, mechanics and technicians. Welding engineers are in high demand. Still, the number of résumés posted on ELX by the local specialists in this proficiency seems insufficient to meet total demand. For instance, while the number of welding engineers recruited abroad is 126 since the start of 2020 until 15 June 2020 (one the most in-demand professions), the number of résumés posted on ELX is only 17.

As for other occupations, despite the existence of supply in Kazakhstan, many employers still continue to employ foreign workers. In particular, the number of local candidates looking for engineering jobs in general (except the welding engineers mentioned above), mechanics, technicians, and electricians remains high.

[31] Migrant workforce in Kazakhstan amid COVID-19/ WDC – AN – FLF – 2020 – 1. CDLR website.

Figure 4.6. Migrants arriving in Kazakhstan



For example, since the start of 2021, 1,875 engineers of various disciplines have arrived in Kazakhstan from other countries, while, according to ELX, there are 5,243 local candidates seeking jobs in the same area, that is 2.8 times more. As for related engineering jobs, according to ELX, local construction engineers seeking employment are 4.6 times more populous, electrical engineers - 2.6 times more populous, and process engineers - 4.2 times more populous than migrant workers holding the same positions.

Thus, there is a shortage of welding engineers in the labor market of Kazakhstan, which subsequently affects the number of foreign workers entering Kazakhstan in this field. In other professions, there is still a lack of compliance by employers with the requirements to hire local personnel over foreign workers; while this may be due to particular and unique skills or experience held by foreign workers being recruited.

The replacement of the foreign labor force with local personnel, as required by Kazakh legislation, can be implemented provided that personnel are trained in accordance with the requirements for qualifications and skills (for example, knowledge of foreign languages, skills to work with new equipment, proficiency in new technologies in their industry). While lack of skills or experience among local jobseekers may result in the recruitment of foreign workers in higher skilled occupations, recruitment of foreign workers in lower skilled occupations is largely due to a lack of interest among Kazakh workers in certain types of occupations and at low salary levels.

iii. Labour migration from and within Central Asia (Kyrgyzstan, Tajikistan, Uzbekistan)

Economic context

The Central Asia-Russian Federation migration corridor has been under the influence of global pressures in recent years including the Covid-19 pandemic, intensifying climate change related natural disasters and their rising costs and consequences; and the digital economy - all reshaping relationships and policies in job market structure, and in supply and demand for labour. The freer labour mobility under the Eurasian Economic Union and bilateral labour migration agreements signed with the Russian Federation also have an effect on migration flows of workers within the region.

The World Bank considers the post COVID-19 economy in Central Asia as experiencing economic contraction not seen for a very long time (not since recession of 1995 during the soviet systems' transition from planned to market economy). Economic activity remains depressed due to the regional decrease of commodity exports by two thirds and to the pandemic-related mobility restrictions. In 2020 the contraction was estimated at 1.7 per cent by the Economic Update for Europe and Central Asia[32]. For example, in Tajikistan, the World Bank specialists noted the new online job listings remaining a striking 74 per cent below 2019 levels, with largest declines in such sectors as tourism, recreation, and entertainment (-94%); production and energy (-93%); and beauty, fitness, and sports (-95%).

Migration drivers from Central Asia have been linked to land degradation, growing population pressure on water resources, and intensifying environmental and climate change consequences. For example, Central Asia's vulnerability to climate change-related weather and natural disasters is reflected in the 10 billion USD and 3 million affected people as annual costs of floods and earthquakes alone.[33] Nevertheless, the main driver of labour migration from the region is economic, with migrants seeking greater employment opportunities and higher salaries abroad, particularly in the Russian Federation. The economic shocks of COVID-19 have only

[32] WB 2020a, BURUNCIUC L., IZVORSKI I. (2020) Central Asia: the first economic contraction in a quarter century, OCTOBER 08, 2020, World Bank blogs, URL: *https://blogs.worldbank.org/europeandcentralasia/central-asia-first-economic-contraction-quarter-century*

[33] WB 2020b, BURUNCIUC, L. 2020, Natural disasters cost Central Asia $10 billion a year – Are we doing enough to prevent them? NOVEMBER 05, 2020, World Bank blogs, URL: *https://blogs.worldbank.org/europeandcentralasia/natural-disasters-cost-central-asia-10-billion-year-are-we-doing-enough*

served to increase these drivers as weak economies in Central Asia leave few employment opportunities while labour shortages in the Russian Federation have resulted in rising salaries.

Migration networks (mostly informal) have been the main resource for migrants from Central Asia to find employment and livelihoods abroad. Informal labour recruitment networks have been the most common way to find jobs quickly in the Russian Federation and Kazakhstan, with internet connections and mobile phones playing a central role in the informality of labour migration in the region. However, better digital connectivity is transforming labour migrants' communications and has the potential to create better conditions for an organized and responsible labour recruitment as well as increasing the informal communications mechanisms between countries of origin and destination.

Demographic context

The Central Asia-Russian Federation labour migration corridor has developed since independence in the mid-1990s. An OECD study (2018) notes that remittance flows have been economically beneficial but also involve costs. Beneficial from the perspective of labour movement allowing to raise household incomes and reduce unemployment in the countries of origin, and the professional skills improvement abroad that is brought back to the sending countries and could generate new activities through increased entrepreneurial capacity of the returnee migrants. However, the social costs of informal work for migrants and their communities of origin are reflected in reduced longevity, poor health, family break-ups, unattended children resulting in health and learning problems.[34] The 2019 assessment of the National Statistics Committee of the Kyrgyz Republic revealed that parents of more than 277,000 children were working abroad.[35] The decision to leave children behind in the care of relatives is made because migrating parents perceive migration as unsafe for their family in the destination country or because employment will not allow them to care for their children abroad.

66 per cent of Kyrgyzstan's population of 6.6 million lives in rural areas.[36] The proportion of female population is slightly higher than male (0.7%), with only 4,9 per cent aged 65 and over, which is almost 10 percentage points lower than in the Russian Federation.[37] The share of young people (aged 14-28) in the total population of Kyrgyzstan is 25.7[38] per cent. According to the analysis of the state of the population in Kyrgyzstan, the number of young people entering the Kyrgyz labour market is currently over 350 thousand per year,[39] whereas the number of unemployed made up 140,9 thousand as of May 2021.[40] Scarce economic opportunities and poverty of the households were the main drivers for labour migration of Kyrgyz nationals for the last 25-30 years as new labour supply entering the labour market each year regularly outnumbers demand. External migration, according to the reports of the State Migration Service of the Kyrgyz Republic in different years, includes almost 1 million citizens of Kyrgyzstan, of which the majority migrate for work in the Russian Federation. The accession of Kyrgyzstan to the Eurasian Economic Union in 2015 resulted in growing numbers of workers migrating from Kyrgyzstan to the Russian Federation and Kazakhstan as residence and employment in those countries became easier and cheaper. There was a growth from 526,000 Kyrgyz migrants in 2014 to about 665,000 - in 2017 in the Russian Federation. In 2020, according to the Ministry of Internal Affairs of the Russian Federation, there were more than 737.9 thousand registrations of migrants from Kyrgyzstan.[41] While there were more than 150,000 registered Kyrgyz nationals in Kazakhstan in 2017 (internal IOM data). Djoldosheva (2018) suggested that the so-called window of opportunity for Kyrgyzstan to gain the demographic dividend opened up during 1975-1980s with the reduced fertility and mortality rates that resulted in lower birth rates and will close in 2030s when the ageing of the country will start. The remittances of between 27 per cent and 34 per cent of GDP of Kyrgyzstan could be considered as a major advantage of the demographic dividend for Kyrgyzstan.[42]

In Tajikistan, the dissolution of the USSR, the subsequent Tajik Civil War,[43] low wages and lack of work opportunities countrywide are among the many complex factors which have acted as stimuli for outmigration from Tajikistan over the last three decades (World Bank, 2017). The 2018 study on migration flows from Tajikistan to the Russian Federation in social and demographic

[34] OECD 2018, ENHANCING COMPETITIVENESS IN CENTRAL ASIA 2018 A REGIONAL AGENDA FOR ECONOMIC DIVERSIFICATION IN CENTRAL ASIA

[35] URL: *https://www.unicef.org/kyrgyzstan/press-releases/over-277000-children-have-been-left-behind-their-parents-kyrgyzstan-labour-migration*

[36] National Statistics Committee of the Kyrgyz Republic, 2021, URL: *http://www.stat.kg/en/*

[37] National Statistics Committee of the Kyrgyz Republic, "Women and Men of the Kyrgyz Republic", 2020

[38] 2016-2018 Kyrgyzstan Statistical Compendium. URL: *http://www.stat.kg/media/publicationarchive/79fa8e42-f719-41b1-8456-c8662a18d282.pdf*

[39] Analysis of state of population in the Kyrgyz Republic, Analysis of the population situation in the Kyrgyz Republic, the National Institute for Strategic Studies, UNFPA, 2017. URL: *https://kyrgyzstan.unfpa.org/sites/default/files/pub-pdf/Unfpa_verstka_FINAL_0.pdf*

[40] URL: *http://zanyatost.kg/Page/PageShow/1016*

[41] URL: *https://xn--b1aew.xn--p1ai/Deljatelnost/statistics/migracionnaya/item/22689602/*

[42] Dzholdosheva D., 2018, Innovations and investments, no. 10, 2018, pp. 87-91.

[43] It is estimated that between the breakup of the USSR (1991) and the end of the Tajik Civil War (1997), Tajikistan's GDP fell by 65 % (see Abdulloev, Gang, Yun, 2014).

perspective indicates that, of the population of eight million in Tajikistan there were 1 million 146 thousand Tajik migrants on the territory of the Russian Federation, 962,200 (84%) of them men and 183,800 (16%) women, mostly of working age. The share of female Tajik migrants has been growing and could now be near 20 per cent[44]. Thus, at any one time, 1 in 10 Tajik citizens turns out to be a migrant. Moreover, if allowances are made for informal and irregular migration, it is possible that this number is considerably higher (IOM, 2021). Money sent by migrants has resulted in significant reductions in poverty nationwide (World Bank, 2019). Depending on the year, between 30 and 50 per cent of the country's GDP arrives in the form of remittances – the vast majority of which are from the Russian Federation – rendering Tajikistan one of the most remittance-reliant countries in the world.

Uzbekistan has the largest population in Central Asia and is one of the biggest economies of the Former Soviet Union after the Russian Federation and Ukraine. The population of Uzbekistan is 33,256,000 as of early 2019, which accounts for 44 per cent of the population of the entire Central Asian region. According to the Ministry of Economic Development and Poverty Reduction of Uzbekistan, 1,678,400 migrant workers from Uzbekistan work abroad. It is suggested that Uzbekistan has the highest number of emigrants among Central Asian states. While the Russian Federation is the main destination country, there has been growing outmigration in the direction of Turkey, Kazakhstan and the Republic of Korea.

Due to the fact that an annual population growth in Uzbekistan amounts to about 1.8 per cent, which is expected to lead to more than 36 million people by 2025, labour migration will remain still for a long time as a trend. The main causes of labour migration are traditionally due to low real wages compared to destination countries; shortage of employment supply in Uzbekistan leading to a considerably high unemployment rate; instability of many workplaces; as well as communication issues among employers and the unemployed, where the latter frequently lack awareness about existing vacancies (UNDP, 2018). Notably, the functioning of labour legislation in Uzbekistan is relatively liberal, as it does not prevent workers from leaving to work abroad (Presidential Decree №пп-3839).

Uzbekistan is considered a country with a young population according to UN classification. As of 1 January 2018, the average age is 28,7 years, with the youngest population living in the most populated Surhandarja (26,9 years of age) and Kaskadarja regions (27,1 years of age). The long-term birth rates reduction and declining mortality (with the exception of 2004-2019, during which there was a rise in birth rates and high mortality were noted between),[45] resulted in a working age population surplus which could, if managed well, bring about economic prosperity through a demographic dividend. However, if not managed effectively, this population surplus may represent a variety of risks.[46]

Importance of labour migration and remittances

The Russian Federation is an important export market and provider of remittances, investments, and (increasingly) overseas development aid for Central Asia, thus any turbulence in the Russian Federation is felt strongly in Kyrgyzstan and Tajikistan, the poorest of the Central Asian countries. All of the Central Asian countries rely heavily on the extraction and export of primary products, particularly oil and gas (Kazakhstan, Turkmenistan, Uzbekistan), metals (Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan), grains (Kazakhstan), and cotton (Tajikistan and Uzbekistan). World prices for nearly all of these products have fallen significantly since 2013.

The World Bank estimates that, as a result of the economic shocks in 2020, an additional 1.4-1.9 million people in Central Asia will fall under the 3.2 USD per day poverty line used to estimate poverty in lower middle-income countries. Central Asia will account for nearly 60 per cent of the new poor in the entire Europe and Central Asia region. In 2020 two of the most remittance-dependent countries in the world, Kyrgyzstan and Tajikistan saw a 12 per cent decline in remittances from the same period a year earlier (January-August).[47] However, growth in 2021 will likely rebound robustly, reflecting recovery in demand abroad, including for commodities, modestly higher commodity prices, and increased foreign direct investment. Kyrgyzstan's household budget survey data indicates that remittances reduce the national poverty rate by some 6-7 percentage points annually[48]. More than 90 per cent of these countries' remittances come from the Russian Federation. Combined with an on-going tightening of the national migration regime, the Russian economic contraction is sharply reducing outflows of remittances to other CIS countries and to the Central Asian countries in particular. Remittances

[44] Акрамов Ш.Ю., Хуснутдинова Л.Г. Миграционные потоки из Таджикистана в Россию в социально-демографическом разрезе// Вестник УГНТУ. Наука, образование, экономика. Серия: Экономика , no. 4 (26), 2018, pp. 122-129.

[45] URL: *https://cabar.asia/en/the-third-decade-of-independence-how-fast-does-the-central-asian-population-grow*

[46] Максакова Л.П. Демографическая ситуация в Узбекистане с точки зрения социальной безопасности // Центральная Азия и Кавказ. 2012. №3. URL: *https://cyberleninka.ru/article/n/demograficheskaya-situatsiya-v-uzbekistane-s-tochki-zreniya-sotsialnoy-bezopasnosti*

[47] WB 2020a, BURUNCIUC L., IZVORSKI I. (2020) Central Asia: the first economic contraction in a quarter century, OCTOBER 08, 2020, Wold Bank blogs, URL: *https://blogs.worldbank.org/europeandcentralasia/central-asia-first-economic-contraction-quarter-century*

[48] Slay, B (2015) Fast Facts: Economic Situation in Central Asia, May 25, 2015 UNDP Regional Bureau for Europe and CIS, URL: *https://www.eurasia.undp.org/content/rbec/en/home/presscenter/articles/2015/5/25/fast-facts--economic-situation-in-central-asia.html?utm_source=EN&utm_medium=GSR&utm_content=US_UNDP_PaidSearch_Brand_English&utm_campaign=CENTRAL&c_src=CENTRAL&c_src2=GSR&gclid=Cj0KCQjwssyJBhDXARIsAK98ITTpG6yl9csiMkYvgrxBqGsBoeV6Jk7162HRFGHgQgphuLFtM-Zyo2kaAgLvEALw_wcB*

of migrant workers transferred to Kyrgyzstan make up a vital lifeline for their families as well as constitute a significant economic reinforcement, equaling to more than 30 per cent of the country's GDP. These remittances are an important contributor to poverty reduction in the country, as observed for the last 10-15 years. However, in 2020 the COVID-19 crisis deteriorated economic situation resulting in 11 per cent poverty increase in the country.[49] Almost 40 per cent of Kyrgyz migrant workers are women who work primarily in the service sector, catering, textiles, and as domestic workers, and a majority of them work informally outside of labour market regulations (working more than 10 hours a day with limited access to social protection services). Women migrants are often facing multiple forms of discrimination and stigma in the country of origin and destination and become vulnerable to sexual and gender-based violence (2016, IOM, UN Women, UNFPA).

ADB (2020) and Ryazantsev and Vazirov (2020) studies show that many Central Asian migrants have experienced either a partial or complete loss of wages as a result of the travel restrictions and lockdown measures in place to combat the virus. Tajik migrants often have very limited access to consular assistance and legal aid and are especially vulnerable during economic crises such as the coronavirus pandemic.[50]

The World Bank (2019) states that more than 26 per cent of Uzbekistan's poorest households have at least one international migrant within their family. Therefore, they are also considerably dependent on remittances which account for 11 per cent of their overall income. Despite a significant decrease in migration flows from Uzbekistan during the pandemic, the rising population and the liberalization of legislative measures concerning external migration, migration flows are expected to increase in the coming years despite potential risks of exploitation related to informality of recruitment and employment.

Overview of the recruitment industry in Central Asia

Each country in Central Asia has been carving out its own country-specific policy, with some being more market oriented and others leaning more towards state control. However, the mixture of the two is becoming a trend in all three countries as labour migration is increasingly seen as a tool to respond to demographic and economic changes.[51]

The field data as of 2021 confirms that the recruitment and vocational training of labour migrants is an institutionalized subsector of Central Asian countries' labour supply to foreign markets. There are key players in it, and regulators, as well as a growing number of entrepreneurs wanting to get a share of this growing sector. The largest share of migrants is absorbed by the Russian Federation, both formal and informal employment, with a growing share of employers in Kazakhstan. The three migrant sending countries: Kyrgyzstan, Tajikistan and Uzbekistan, have had their advantages from easing the labour surplus pressure inside the region and benefiting from the remittances tightly linked to the demographic dividends of the largely young adult population in all three countries. While there are many similarities in labour emigration, each country has important differences that are reflected in the policy choices and systems of migration regulation.

In regards to the recruitment industry regulatory structure and market function, there is a certain level of spontaneity and entrepreneurship within the recruitment agency field, while the vocational training is a much more established and historically pre-determined system inherited from the old soviet educational and industrial relations networks. State Recruitment Agencies (SRA) are present in all three countries, while private recruitment agencies (PRA) also exist, often under a licensing system. In Kyrgyzstan and Uzbekistan the PRAs that have been granted licenses to conduct international recruitment are all listed as open data online.[52]

Kyrgyzstan

In Kyrgyzstan, the key regulator is the Information and Consultation Centre of the Department of External Migration of the Ministry of Foreign Affairs(since January 2022 – Center for Employment of Citizens Abroad under the Ministry of Labour, Social Security and Migration) (alongside the State Migration Service). The stakeholders that are involved in the policymaking and/or implementation of policy on recruitment and vocational training are as follows:

- Iand Consultation Centre (ICC) of the Department of External Migration of the Ministry of Foreign Affairs of the Kyrgyz Republic (since January 2022 – Center for Employment of Citizens Abroad under the Ministry of Labour, Social Security and Migration);
- Agency on Primary Vocational Education and Training under the Ministry of Science and Education of the Kyrgyz Republic;

[49] URL: *https://www.worldbank.org/en/news/feature/2021/03/17/one-year-later-in-the-kyrgyz-republic-s-battle-against-covid-19*

[50] For more information on this, see ADB, 2020. p. 15.

[51] Dzholdosheva D.S ., "Migration processes and the demographic dividend of the Kyrgyz Republic" Innovations and investments, no. 10, 2018, pp. 87-91

[52] Website in the Kyrgyz Republic with a listing of private recruitment agencies and their status of licensing, active or idle, renewal status, etc., URL: *Гhttp://www.migrant.kg/ru/services/employment-agency/?page=5&country_id=1*; Website in the Republic of Tajikistan, URL: *http://tajmigration.ru/normativno-pravovye-akty-respubliki-tadzhikistan.html* (there was no listing of private recruitment agencies found here)
Website in the Republic of Uzbekistan with a government register of private recruitment agencies, their status of licensing, active or idle, renewal status, etc., *https://mehnat.uz/ru/services/reestr-chastnyh-agentstv-zanyatosti*

- Association of Private Recruitment Agencies of the Kyrgyz Republic;
- Union of Private Recruitment Agencies of the Kyrgyz Republic;
- Between 37 and 74 private recruitment agencies registered on the website of the ICC (with various status of their license activity);
- 98 state-funded professional technical lyceums, school centres;
- Private vocational training centres, including the largest actors such as the University of Central Asia's School of Professional and Continuous Education, and associations of ICT and digital development.

The Migration Policy of the Kyrgyz Republic, adopted in May 2021, envisages safe, regular, and orderly migration that enhances the protection of migrant workers and establishing and building government capacities to manage labour migration programmes that facilitate the matching of training programmes and prospective migrants from Kyrgyzstan with labour market needs and employer demand in countries of destination.

The legislation of Kyrgyzstan allows for licensing of PRAs. The Information Consultation Centre of the Department of External Migration of the Ministry of Foreign Affairs (since January 2022 – Center for Employment of Citizens Abroad under the Ministry of Labour, Social Security and Migration) is responsible for monitoring the PRAs and issuing licenses. Although there are more than 74 licensed PRAs in Kyrgyzstan, the vast majority of migrant workers to the Russian Federation and Kazakhstan rely on their networks of friends and family to get access to job opportunities mostly focused on such sectors as construction, services (taxi, hotels, cleaning, catering), trade, and agriculture[53]. Many young migrants search for migration options immediately after they finish their studies and often lack any skills or experience for qualified work in the country of destination . Insufficient preparedness of migrant workers from Kyrgyzstan makes them vulnerable in terms of both finding decent employment and protection of their rights. While 52 per cent of Kyrgyz migrant workers in the Russian Federation are fluent in the Russian language, there are those who have difficulties in finding decent jobs often due to the lack of language skills.

Tajikistan

In Tajikistan, the Ministry of Labour, Migration and Employment is the government body working on issues related to outmigration, recruitment, skills development/ vocational training. Prospective and returnee migrants are the main beneficiaries of short-term courses (2-3 months) offered by the Adult Training Centres of the Ministry of Labour, Migration and Employment. Programs for recognition of prior learning is mostly used by returnee migrants to certify their skills gained abroad. The stakeholders that are involved in the policymaking and/or implementation of policy on recruitment and vocational training are as follows:

- Ministry of Labour, Migration and Employment;
- Ministry of Education and Science;
- Ministry of Economic Development and Trade;
- State-funded Professional technical schools;
- University of Central Asia's School of Professional and Continuous Education;
- Private sector recruitment agencies (a moderator of FGDRT mentioned 37 companies active in Tajikistan; there is no officially confirmed source in public domain);
- NGOs working in the field of skills development.

In Tajikistan there are migration service centres operating in each district and town; however, limited resources do not allow the staff to offer a wide range of services, including on social and psychological issues, to many migrants who have been banned from re-entering the Russian Federation. Public Employment Services meanwhile registered 60,500 people in 2017 which is approximately 20 per cent of the estimated unemployed population. The services provided, however, are largely irrelevant, due to a lack of data on the labour market, budget constraints, and outdated training methodologies. Short-term training also does not teach the competencies required for high demand or high prospective occupations. While vulnerable groups such as women with children and people living in remote rural areas find it difficult to access services and training due to issues associated with accommodation, transportation and related costs. As confirmed by several existing studies, informality of recruitment and employment is widely prevalent in labour migration from Tajikistan (Abdulloev, I., Gang, I. N., and Yun, M. 2014).[54]

In Tajikistan, unemployment for a month or longer is a common experience, along with difficulties associated with acquiring the documents required in order to work legally. Moreover, prospective migrants pay an average of 3,293 TJS (approximately USD 292) for migration-related costs. This mainly goes towards paying for transport and documentation fees and is twice as much as the average monthly salary in Tajikistan. As a consequence, 78 per cent of migrants have to acquire a short-term loan before they leave – placing them in a vulnerable financial position from the outset of their journey.

Informal networks are the primary source of information on recruitment and employment opportunities among citizens of Tajikistan. Research demonstrates that 85.5 per cent of migrants use informal networks of relatives and friends when searching for

[53] Sagynbekova L., International Labour Migration in the Context of the Eurasian Economic Union: Issues and Challenges of Kyrgyz Migrants in The Russian Federation, Working Paper #39, 2017)

[54] URL: *https://ideas.repec.org/p/crm/wpaper/1124.html*

employment abroad – while a mere 1.7 per cent make use of recruitment agencies (JICA, 2018; ADB, 2020). Despite not using recruitment agencies, over 70 per cent of migrants leaving for work have pre-prepared documents and employment agreements. Tajik survey respondents agreed that, without these networks, it would be impossible for most migrants to secure work abroad.

Previous research on problems and grievances of Tajik migrant workers in the Russian Federation provides evidence on how informal jobs are often lucrative to the employers in the Russian Federation and seem advantageous to the labour migrants in the short-term. However, long-term costs of informality exist for both employers and migrant workers in a variety of outcomes including work safety, health, labour regulations, and industrial relations irregularities, life-long injury, inability to work and earn, inability to migrate again. Unfortunately, often both employers and workers take a short-term vision to the labour migration experience and opt for lower cost, informal recruitment and employment channels.

Uzbekistan

In Uzbekistan, the main regulator(s) overseeing labour migration are the Ministry of Employment and Labour Relations and the Agency for External Labour Migration and its regional Agencies for External Labour Migration (AELM). The stakeholders that are involved in the policymaking and/or implementation of policy on recruitment and vocational training are as follows:

- Ministry of Employment and Labour Relations;
- Ministry for the Support of Mahalla and Family (and the Department for the Protection of Rights and Support of Citizens of Uzbekistan Working Abroad);
- Agency for External Labour Migration (and its regional representative offices);
- Ministry of Higher and Middle Special Education;
- Professional training schools and centres, state-funded and supported by international projects;
- Private sector educational centres;
- Private recruitment agencies (PRAs) registered with the Ministry of Employment and Labour Relations (there is a list of 61 officially registered PRAs[55], however, FGD testimonials mentioned only three private recruitment agencies that currently have the license for actively recruiting in Uzbekistan).

In Uzbekistan, the legislative measures aimed at providing assistance in recruitment and skills development for Uzbek migrants are in the ongoing process of positive transformation, however, the qualitative and quantitative data on the activity of private companies is lacking. The data collected in the course of this research (the survey of returnee and prospective migrants from Uzbekistan, and focus-group discussions with recruitment agencies and vocational training centres in Uzbekistan), allows to conclude that, due to ineffective communications with the target audience regarding recruitment companies' services, there is a risk of being exploited by their employers if there is no witnessing intermediary in the job search, qualifications confirmation, and contracting clauses in accordance with the national regulation in the sending and receiving countries of labour migration. Considering these risks, an assessment of communication channels and, as a consequence, development of effective communications strategies are needed in order to effectively communicate and raise awareness about recruitment services to the target population.

The Agency for External Labour Migration is the main public institution offering comprehensive support to migrants. During the course of 2021, in addition to the Russian Federation and Republic of Korea, representative offices are due to be opened in Turkey, UAE and four more Russian cities. They are authorized to settle contracts with foreign employers and cooperate with diaspora organizations abroad. However, the programs of organized recruitment for migrants have partly failed due to their unreliability and high costs for the participants. According to a number of complaints of migrants who were participating in these programs, the Agency was not able to provide full protection of their rights, while the employers in the Russian Federation did not abide by the terms and conditions set by the Agency (CABAR, 2019).

To reduce the monopoly of public organizations assisting migrants, the government allowed private companies to take over similar functions. Nevertheless, several Uzbek NGOs based in the Russian Federation have reported that they do not have adequate cooperation with Uzbek authorities, therefore, their assistance lacks a firm legislative ground. As regards PRAs based in Uzbekistan, as of October 2020, 28 have licenses, but the number of PRAs whose licenses have been revoked is 47 (Djoldasova, 2020).

The Agency for External Labour Migration provides the majority of services for the organized international recruitment of workers. Due to the dominance of the public recruitment system, the private recruitment agencies have a very small share of the market. The Agency for External Labour Migration is entrusted with collaboration with foreign employers while migrants do not fully trust private recruitment agencies. This is partly due to very few success stories on adequate collaboration with foreign employers. For example, in 2019 out of 65 officially registered private recruitment agencies 30 were not able to help a single migrant find work abroad.[56] The lack of competition is due to the unified state employment

[55] URL: *https://mehnat.uz/en/services/list-of-private-employment-agencies*

[56] Примерно половина частных агентств занятости в Узбекистане не смогла отправить за рубеж ни одного человека , Новости Узбекистана сегодня (podrobno.uz) 25/10/2019.

policy implemented by the Ministry of Employment and Labour Relations, perhaps as a part of the earlier stages of government policy for organized recruitment and will be liberalized with time, as is happening in Kyrgyzstan.[57]

During his first visit to the Russian Federation in 2017, the President of the Republic of Uzbekistan, Shavkat Mirziyoyev, signed an "Intergovernmental agreement on organized recruitment and attraction of the citizens of Uzbekistan for temporary employment in the territory of the Russian Federation". The Agreement included the requirements of pre-departure training for migrants in their country of origin, which consists of information on the Russian labour market, relations of migrants with their employers, and the specifics of labour contracts. In addition, the agreement states that the employer should provide accommodation, safe working conditions and guarantee a minimum wage. The Agreement has not yet been functioning on full-scale, as there are periodic violations of migrants' rights regarding labour conditions. From the Russian side, authorities have complained that some Uzbek migrants are misrepresenting their professional background and do not have ths skills that are claimed or required for the job (Sadovskaya, 2020).

Bartolomeo, Makaryan and Weina (2014) confirmed that informal ways for finding employment prevail in the migration flows between the Russian Federation and Central Asia, as revealed by the communication channels used by migrants.[58] Migrants from Uzbekistan find jobs primarily with the assistance of their relatives and acquaintances, unofficial intermediaries and job publications on the internet, and through their migration channels they can get help with guest and tourist visas and private job invitations.

[57] Аскаров З.С. Тенденции государственной политики Республики Узбекистан в области внешней трудовой миграции. Санкт-Петербургский политехнический университет Петра Великого, Санкт-Петербург, Россия

[58] Bartolomeo A., Makaryan W. 2014. Regional migration report: The Russian Federation and Central Asia. *European University Institute.* Italy. RussiaAndCentralAsia_MPC_CarimEastReport.pdf (eui.eu)

V. STAKEHOLDER INTEREST

i. Employers in the Russian Federation

Channels for employers in the Russian Federation to recruit migrant workers from Central Asia

According to the Russian employer survey, most employers find their workers from Central Asia through social contacts and particularly via previously employed or existing workers (71%). For instance, HR professionals from industrial, construction and agricultural companies report that they prefer hiring their staff through a recommendation from workers who have a proven track record with them. Interestingly, some employers stated a preference to hire family members of existing workers as they believed this practice further anchors the migrants to their jobs and makes them less likely to leave.

Online job-hunting platforms are actively developing, yet still remain underutilized — they are used by 50 per cent of employers (Job.Ru, HH). This channel is developing particularly quickly in the segment of qualified and highly qualified jobs but is largely unused for lower skilled occupations. Social networking sites are also a growing resource for seeking workers (Facebook and Telegram) according to a number of sources including "We, migrant workers;" MIGRANTO.RU and Tajik Migration Service representative office in the Russian Federation (figures 5.1-5.3).

Figure 5.2. Social networking in Facebook and Telegram

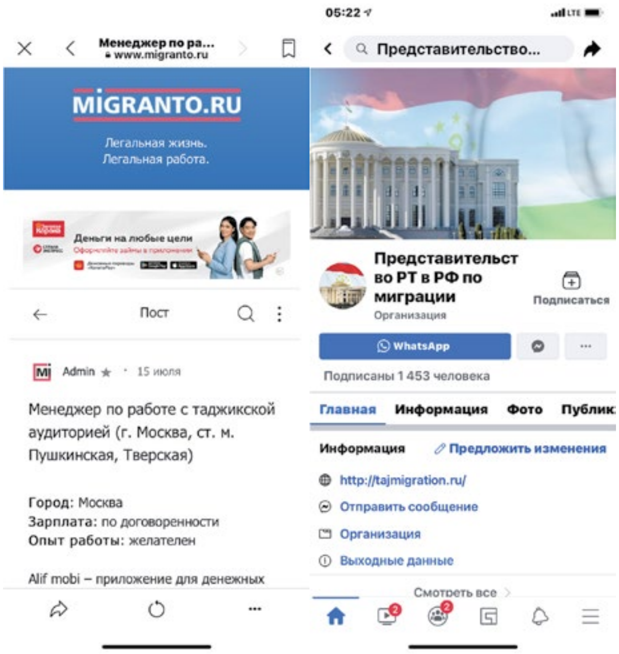


Figure 5.1. Social networking in Facebook and Telegram

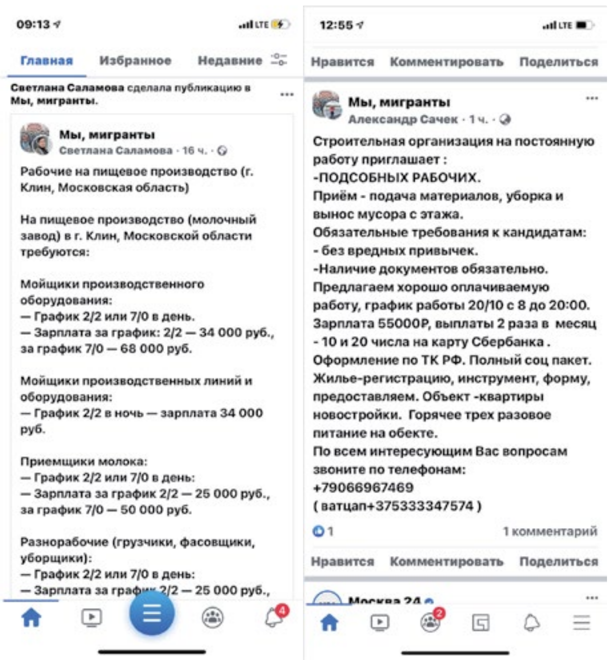


Figure 5.3. Social networking in Facebook and Telegram

In addition, private intermediaries (agents) still play a large role in the Russian labour market (usually coming from the same Central Asian countries) providing recruitment services for their fellow citizens — 26 per cent of employers have used private intermediaries to find workers.

Only 16 per cent of employers surveyed currently use PRAs. These are mainly large businesses in construction, agriculture, manufacturing, and the services industry with demand for large numbers of workers. Recruiters are predominantly engaged by socially oriented and responsible employers, usually large and medium-sized businesses, who have the means and also have HR departments to facilitate recruitment. This practice is primarily used in Moscow and Tatarstan.

Around 8 per cent of employers have hired migrant workers through Russian government agencies. Similarly, 8 per cent of the employers in the Russian Federation have cooperated with government agencies in Central Asia (Table 5.1), primarily the Agency for Foreign Labour Migration Affairs in Uzbekistan. Experts have highly rated the career fairs held in Uzbekistan.

labour market. Two intergovernmental agreements have been signed on organized recruitment and migrant labour attraction between the Russian Federation and Uzbekistan (5 April 2017) and Tajikistan (17 April 2019). These agreements are intended to secure adequate labour resources for the employers in the Russian Federation and protect the rights and lawful interests of migrant workers. However, in 2019, under the organized recruitment framework, only 2,000 workers came to the Russian Federation through these mechanisms.[59]

The real study of the organized recruitment mechanism began during the C o the Russian Federation was discontinued. Since 18 March 2020, by resolution of the Russian Government No. 372-r dated 16 February 2021, resolution No. 635-z has been amended to enable the employers in the R OVID-19 pandemic when the borders were shut and migration of workers from Central Asia tussian Federation to hire migrant workers from the list compiled under the Operational Guidelines for Recruiting Migrant Workers to Work in the Russian Federation approved by the Operational Headquarters on preventing COVID-19 spread in the Russian Federation.

Table 5.1. Distribution of employers' answers to the question: "How do you usually find workers from Central Asia? "(multiple choice question) (findings of the sociological survey, N = 473 employers)

Ways to search for migrant workers in the labour market	Number of employers	Share of responses, %
Through current employees	336	71%
On the Internet	237	50%
Through colleagues and acquaintances	156	33%
Through intermediary individuals (agents)	123	26%
Through private recruitment agencies	76	16%
Through unofficial recruitment platforms	61	13%
Through Russian government agencies	38	8%
Through government agencies in Central Asia	38	8%
Other options (career fair in Uzbekistan; company's own database)	33	7%

Organized recruitment from Central Asia in the Russian Federation

Political and business entities began discussing the possibility of developing more organized recruitment systems even before the lockdown and closure of borders due to the spread of coronavirus in 2020. Most employers understand organized recruitment as an opportunity for targeted employment of migrant workers predominantly from Central Asia and their relocation to the Russian Federation. Government authorities often see organized recruitment as an ideal framework for attracting and utilizing migrant labour in the country so as to avoid informality and better manage the development of the

On 23 April 2021, Operational Guidelines for Recruiting Migrant Workers to Work in the Russian Federation was enacted which, coupled with intergovernmental agreements between Uzbekistan and Tajikistan, created a real mechanism and allowed large Russian businesses (average headcount over 250 people, income over RUB 2 billion) to engage in organized recruitment of workforce from these two Central Asian countries. The point of the Operational Guidelines is to organize the recruitment process. Employers need to file an

[59] Y.u Pakina. We hire migrants from Tajikistan under the organized recruitment framework // Migration expert. 15 July 2021. URL: *https://all-migration.com/journal/trudoustroystvo-inostrantsa-oformlyaem-pravilno/prinimaem-po-orgnaboru-inostrantsev-iz-tadzhikistana/*

application with the relevant ministry approving the lists of workers with the Ministry of Internal Affairs. Once the migrant workers have arrived, the employer is in charge of their accommodation, compliance with sanitary and epidemiological requirements and permits – work patents for employment in the Russian Federation. Upon contract expiry, employers must arrange for organized return of migrants to their home country.

Unfortunately, the Operational Guidelines do not cover the SME segment and self-employed who also actively employ migrant workers from Central Asia but are not currently able to use this organized recruitment mechanism. In early June 2021, small Russian businesses (up to 100 employees, income of at least RUB 800 million) were allowed to hire migrant workers under the organized recruitment framework as well. These are mainly agricultural producers with a lot of physical work (farms, stock breeders, vegetable farming) and developers. It is no coincidence that this idea is supported by the Russian Ministry of Agriculture, whose proposal is to advance the Operational Guidelines and ease the criteria to allow employers with at least 15 employees and income of RUB 120 million to be able to access the program, which corresponds to the microbusiness level.[60]

The Russian Ministry of Construction, Housing and Utilities (Minstroy) proposed 'targeted' employment of migrant workers for specific construction projects and regions pursuant to the employment contracts signed in the worker's county of origin.[61] Minstroy is collecting and analyzing requests from regional authorities and developers on bringing additional migrant workers to the Russian Federation. The requests are reviewed with the involvement of Rospotrebnadzor and the Ministry of Internal Affairs. Entry into the country based on developers' requests has been permitted since January 2021. Up to the time of publication, Minstroy has approved entry requests for 15,000 construction workers, with the majority from Uzbekistan, Kyrgyzstan, Kazakhstan, Azerbaijan, Serbia, Croatia, and Bosnia and Herzegovina.[62] Based on the Operational Guidelines, the key Russian regions began to gradually test the organized recruitment schemes for migrant workers. For example, Aleksandr Beglov, the Governor of Saint Petersburg, was responsible for the implementation by the Saint Petersburg Committee for Labour and Employment which developed the list of professions of high demand in the regional labour market. Employers need to file an application via the Russian Federation Database of Vacancies and CVs 'Trudvsem.ru,' justify the requirement for foreign labour , provide details of the business and the contract for organized recruitment signed with the authorized agencies based in the foreign state. Employers must also comply with all the requirements listed in the Operational Guidelines. In this manner, employers are assisted by the state-owned Saint Petersburg Labour Resources.[63]

Figure 5.4. Model of organized recruitment of foreign workforce under the Operational Guidelines in Saint Petersburg

The scheme of implementation of the organized recruitment of employees

1. Conclusion of an Agreement with an Employer
- submission of an application by the employer with detailed requirements and a description of working conditions

2. Selection of Candidates
- specialists of the Centre select candidates on the basis of information provided by employers of Saint Petersburg

3. Verification of Candidates
- verification measures to determine an entry ban to the Russian Federation

4. Video interview
- with the pre-selected candidates

5. Pre-Departure Preparation
- primary medical examination of the candidates in the country of origin (HIV, TB, Hepatitis tests)
- clarification of labour and migration legislation
- coordination of the arrival date

6. Arrival to Saint-Petersburg
- meeting the employer
- information and consultative services

7. Patent Acquisition Services
- tests on the Russian language, history and fundamentals of legislation
- registration of Voluntary Medical Insurance Policy
- mandatory medical examination

8. Information and Consultative Support of Employers
- throughout the entire term of the contract

Cooperation with the Centre of Labour Resources of Saint Petersburg:
- possibility of remote selection of candidates
- a set of pre-departure verification measures among candidates for violations of Russian legislation
- an opportunity for a migrant to get full information about working conditions and requirements of the employer in advance

[60] Y.u Pakina. We hire migrants from Tajikistan under the organized recruitment framework // Migration expert. 15 July 2021. URL: *https://all-migration.com/journal/trudoustroystvo-inostrantsa-oformlyaem-pravilno/prinimaem-po-orgnaboru-inostrantsev-iz-tadzhikistana/*

[61] The Russian Federation adopts new migrant workers' recruitment policy // migranty.org. 25 March 2021 URL: *https://migranty.org/novosti/v-rossii-opredelili-novyj-porjadok-privlechenija-trudovyh-migrantov/*

[62] Migrant workforce shortage leads to higher pay for laborers // RBC. 23 August 2021. URL: *https://www.rbc.ru/technology_and_media/23/08/2021/611fa69d9a7947f545ce3f5c*

[63] Organized recruitment of non-resident workers in Saint Petersburg // Labour Resources Center. URL: *https://gauctr.ru/uslugi/orgnabor_land/*

- guarantee of employment and regular labor relations
- an opportunity for a migrant to find a new place of work in case of dismissal

The network of operators and infrastructure are gradually evolving to promote the Organized Recruitment model. In late 2020, the Unified Migration Centre (part of Bronka Group Holding) signed a cooperation agreement with the Saint Petersburg Labour Resources Centre. Under this agreement, the companies of Bronka Group Holding have undertaken to provide comprehensive support services for foreign migrant workers: from meet-and-greet at the airport to employment and facilitation of new employment for migrant workers who have lost their jobs in the pandemic. In February 2021, a representative office of the Labour Resources Centre was opened in the Unified Migration Centre in Saint Petersburg where foreign nationals can find information on job openings in the city as well as seek clarifications and advice on employment law. The job openings database contains more than 3,000 requests from employers, updated on a daily basis. The job search services for migrants are provided free of charge. In addition, the Saint Petersburg Committee for Labour and Employment and Labour Resources Centre are opening information desks for employers where they can get clarifications regarding the employment.[64]

According to the sociological survey, around 60 per cent of surveyed employers in the key surveyed regions know about the organized recruitment mechanism. Which means that 40 per cent remain unaware. Yet only 43 per cent of surveyed employers are aware of the main aspects of the Operational Guidelines for Recruiting Migrant Workers to Work in the Russian Federation, adopted on 23 April 2021, meaning that 57 per cent are basically unaware of this framework and the opportunities to engage in regular recruitment. In practice, only 3 per cent of employers have hired their workers via the organized recruitment scheme with another 13 per cent planning to use it going forward (Table 5.2). These results appear to indicate a need to promote and raise awareness about this recruitment mechanism among employers throughout the Russian Federation.

The sociological survey has revealed that organized recruitment is now operational in four surveyed regions: Tatarstan – 5 employers (or 39 per cent of employers who answered yes to the question on using the organized recruitment mechanism), Moscow – 3 (23%), Moscow region – 3 (23%), and 2 — Saint Petersburg and Leningrad region (15%). It would be fair to say that cross-border travel restrictions introduced during the pandemic contributed towards the 'launch' of the organized recruitment framework in the Russian market. The low utilization rate of the organized recruitment framework is explained by the fact that, so far, it only addresses large businesses which meet the requirements of the Operational Guidelines, including the average headcount of over 250 people and income exceeding RUB 2 billion. To expand its use, the Operational will need to expand eligibility criteria and government support to bring a larger number of employers into the program.

According to the survey findings, organized recruitment is currently operational in construction, agriculture, manufacturing, housing and utilities. Each employer has, on average, hired 113 citizens from Uzbekistan and 30 from Tajikistan via organized recruitment. The trades with the highest demand were repairman, operator, fitter, service man, road worker, road roller operator, moulder, signaller, welder, laborer, iron-, concrete and pipeworkers, and electrical insulation worker.

Table 5.2. Distribution of employers' answers to the questions related to organized recruitment of migrant labour (findings of the sociological survey, N = 473 employers)

Questions	Yes	No	Other
Are you aware of organized recruitment program in the Russian Federation?	60%	40%	0%
Are you aware of the Operational Guidelines for Recruiting Migrant Workers to Work in the Russian Federation (approved on 23 April 2021)?	43%	57%	0%
Is your company registered in the "Work in Russia" All-Russian Database of Vacancies?	45%	55%	0%
Did your company (entity) recruit any migrant workers from Central Asia through organized recruitment schemes before March 2020 (before the COVID-19 restrictions were imposed)?	3%	97%	0%
Did your company recruit any migrant workers from Central Asia through organized recruitment schemes after March 2020 up until recently (after the COVID-19 restrictions were imposed)?	3%	84%	13% (plan to use)

[64] Nikita Murov: new decisions have to be made extremely fast // Labour Forum. 01 May 2021. Available at: https://labourforum.ru/novosti/nikita-murov-prinimat-novye-resheniya-prihoditsya-ekstremalno-bystro/

Table 5.3. Distribution of employers currently using organized recruitment scheme by geography and industry (findings of the sociological survey, N = 13 employers)

Regions	Number of employers	Share of responses, %	Key industries
Republic of Tatarstan	5	39%	• Construction and repair of buildings and structures • Agriculture • Trading, catering, hotel business
Moscow	3	23%	• Construction and repair of buildings and structures • Housing and utilities • Industrial production
Moscow Region	3	23%	• Construction and repair of buildings and structures • Industrial production • Agriculture
Saint Petersburg and Leningrad Region	2	15%	• Construction and repair of buildings and structures • Industrial production
Total	13	100%	

Employers who have utilized organized recruitment in 2021, spent, on average, up to five months on formalization procedures under the Operational Guidelines. This has led many employers to complain that the procedures are bureaucratically intensive and underdeveloped. The same view is shared in the expert interviews. While the initial recruitment processes were successful, improvements will need to be made to their functionality to reduce bureaucratic procedures and speed up processes in order to make it more accessible to employers. One of the key weaknesses of the process is the lengthy procedure to ensure compliance with the Russian laws which runs counter to the rapidly changing business requirements and living conditions of foreign nationals.

Interview with Rosstrud official (Moscow)

The quantitative requirement for migrant workers is determined by the number of requests posted by employers on the 'Work in Russia' database. The company itself looks for migrant workers based on qualification and professional skills and the list of job openings which would help fill the 'labour gap.' The effort to ease the Operational Guidelines eligibility criteria and an emerged opportunity to engage migrant workers under the organized recruitment agreement have contributed to a positive trend proving that Russian businesses are willing to hire migrant workers through this mechanism.

According to developers and agricultural organizations, the main complications arise from the small number of direct flights to the Russian Federation and the high cost of travel. To hire a foreign national, a list of migrant workers has to be approved with the Operational Headquarters for the prevention of the spread of COVID-19 in the Russian Federation so that charter flights could be subsequently arranged. Charter flight requests could take an indefinite time to process.

3/4 (77%) of the employers in the Russian Federation have engaged operators (agencies) to assist them in organized recruitment: both overseas (Agency for External Labour Migration in Uzbekistan, Representative Office of the Ministry of Labour, Migration and Employment of the Population of Tajikistan in the Russian Federation) and local entities (Apex Tour LLC tour operator; MigGarant, Ministry of Labour, Employment and Social Protection of Tatarstan). For example, the Ministry of Agriculture for Moscow region is actively assisting MALINO agricultural holding in organized recruitment of workers from Uzbekistan and Tajikistan. The vast majority of employers (80%) have given a positive rating to the performance of operators and only 20 per cent had negative feedback. In the organized recruitment process, operators mainly took up such activities as selection of candidates and introducing them to the job openings and working conditions as specified in the employer's request, checkup for restrictions to enter and work in the Russian Federation (63%), arrangement of medical examinations (38%), initial questioning and interviews to determine the qualification and proficiency in Russian, verify any international travel restrictions in the home country, arrangement of online interviews with the employer, assistance in buying tickets to travel to the location of the Russian employer (25%). To a lesser extent, the operators were involved in adaptation procedures: only in 13 per cent of the cases agents participated in organizing or assisted in signing up migrant workers to Russian language courses but did nothing in pre-departure orientation and briefing on Russian laws and regulations concerning the migrant workers' stay and employment in the Russian Federation.

Later in the organized recruitment process, when workers are already in the Russian Federation, the role of the operator was significant. In 3/4 (78%) of the cases, operators continued to support employers and in 44 per cent of the cases, they assisted in worker replacement. The sociological survey has revealed that the employers in the Russian Federation who utilize organized recruitment provide a rather extensive social benefits and guarantees

Table 5.4 Distribution of employers' answers to the questions related to organized recruitment agency's support to the migrant workers and employers in the Russian Federation (findings of the sociological survey, N = 13 employers)

Involvement of organized recruitment agencies of support to migrant workers and employers	Share of responses, %	
	Yes	No
Did the organized recruitment agency continue to support your company (entity) and the labour migrants until the end of the latter's probation period?	78%	22%
Did the organized recruitment agency replace migrant workers at the request of your company (entity)?	44%	56%

package to migrant workers. First of all, it is notable that in 100 per cent of the cases, there were employment contracts in place between the employer and migrant workers arriving under organized recruitment. A formal employment contract made social guarantees accessible to migrant workers pursuant to the collective labour agreement between the employer and their staff members. However, according to the sociological survey, only 66 per cent of respondent employers in the Russian Federation provide guaranteed salary equivalent to no less than the minimum wage, and only 60 per cent provide the right for vacation in accordance with the Russian law and employment contract. The findings imply that inclusion of employers in the organized recruitment framework requires them to adhere more closely to labour laws than employers that engage in informal means of recruitment.

According to the sociological survey, employers using organized recruitment for the most part provide their migrant employees with the key benefits: accommodation in a dormitory – 10 (77%), patent registration – 9 (69%), certification of qualification – 9 (69%), meet-and-greet at arrival point – 8 (62%), migration registration – 9 (62%), purchase of tickets (or lending money for the purchase) – 6 (46%).

Table 5.5. Distribution of employers' answers to the question: "Which of the following did your company (entity) provide in connection with the organized recruitment of migrant workers from Central Asia?" multiple choice question (findings of the sociological survey, N = 13 employers)

Options provided by your company (entity) to migrant workers	Number of companies	Share of responses, %
Providing migrant workers with hostel accommodation	10	77%
Paying for or loaning a migrant worker money to obtain a license to work in the Russian Federation	9	69%
Arranged for confirmation (recognition) of their qualifications	9	69%
Meeting migrant workers at the airport (train station)	8	62%
Assisting migrant workers with primary migration registration	8	62%
Arranging for migrant workers to go through the necessary procedures (medical examination, obtaining voluntary health insurance, passing a comprehensive examination) to obtain a license to work in the Russian Federation	6	46%
Paying for or loaning a migrant worker money to purchase a ticket to the Russian Federation	6	46%

As seen from experience of organized recruitment, a formal employment contract is not always consistent with employers' verbal commitments declared at the stage of recruitment in the country of origin. The survey has also revealed that 6 employers (46%) who used organized recruitment had workers quitting who quit shortly after arrival. Several develoers noted that some workers began to quit after their arrival to work in courier services and other spheres, as reported back in April 2021 by the CEO of Inteco Group, A. Nikolaev.[65]

There is also a bad experience with organized recruitment mentioned in the press and in the expert's in-depth interview. There was a story in the press about 200 migrant workers from Uzbekistan arriving under organized recruitment via the Uzbekistan Labour Migration Agency to work for PIK Industry (part of PIK Group, one of the largest developers in Moscow and Moscow region). The migrants claimed to have been lied to about the plane tickets, provided accommodation in a dormitory with poor sanitary conditions, forced to take loans and never received the promised pay. Each worker paid USD 450 for a ticket while the real price was USD 250. The employer verbally committed to pay a salary of RUB 75-90,000 which is half of what was originally agreed to in Uzbekistan. Steel fixers (40 people needed) were promised a salary of RUB 70-100,000, bricklayers – RUB 70-100,000, electrical welders – RUB 60-90,000, plumbers – RUB 60-100,000. Workers were also forced to borrow RUB 28,000 for patent registration, which put

[65] Migrant workforce shortage leads to higher pay for laborers // RBC. 23 August 2021. URL: *https://www.rbc.ru/technology_and_media/23/08/2021/611fa69d9a7947f545ce3f5c*

Interview with a representative of KAMAZ PJSC HR (Naberezhnye Chelny, Tatarstan).

Total headcount - around 40,000 people, 70 per cent - general workers, 30 per cent - specialists ranging from foremen to engineers. At present, there are no migrant workers among staff members. We are starting organized recruitment now. We had planned to bring people [migrant workers] by 01 March 2021, so that by the time of summer staff outflow in May-June, we would have instructed migrants in March-April to make sure they are trained and accommodated. We provide accommodation in a comfortable dormitory: four rooms and one kitchen per floor, two beds per room. It is a housing subsidiary of KAMAZ. Under the agreement, accommodation is provided at the expense of the employer. This is payment for the limitation: they arrive to work specifically for KAMAZ. A foreign national is hired on the payroll and formally registered. They are covered by the collective labour agreement of KAMAZ PJSC which provides for a daily meal compensation of RUB 60-100 depending on the grade, compensation for transport expenses for commute between work facilities. They receive a competitive salary, with an extra pay for the summer period (+RUB 5,000 to base salary). For example, a repairman gets RUB 35,000 plus accrued benefits at the end of the employment term. We have agreed that if we engage an agent to hire workers, the agent supports them up to the patent stage, so insurance and translations of documents are the responsibility of the agent. Another way is via Uzbekistan government authorities (Labour Migration Agency). They provide loans to the migrants so that they have the money for the first month of their stay in the Russian Federation and then we partially repay them from their first salary. We utilize both options because we need workers. We started this process on 21 January 2021, five months ago. Major complications include control over migrants upon their arrival to the Russian Federation. The pandemic has its implications. Everyone is trying to shift responsibility onto the business, but the problem is that before they get a patent, they are not our employees. We cannot force them to live in one place and stay locked up during the self-isolation period. It is unclear who is responsible for them. Yes, we did provide accommodation but who should supervise them during the 14-day quarantine? We cannot guard them. The Ministry of Labour says we have to make sure they do not violate the regulations, but nobody says how this could be done. Should there be a superior in charge among the migrants? Who should control the 'transfer' of migrants from one party to another?

The Sodruzhestvo Agency in Moscow has experience in bringing migrant workers to the Russian Federation. They have a long track record and bring 120 workers on each charter flight from Uzbekistan. If we choose to act on our own, we need to go to Samarkand, train the people there and complete training in the Russian Federation. It is a more time-consuming option.

them in debt with one of the Russian banks.[66]

Organized recruitment is considered the most acceptable form of employment of migrant workers from Central Asia and was perceived positively by the majority of experts and employers interviewed and surveyed. 94 per cent of employers state that organized recruitment has certain advantages. The key advantages mentioned by the employers included: stability (39%), guaranteed legality (37%), quality of the labour resource selection process (37%), cost savings (35%), quantity of workers (30%), employment support (30%), opportunities for real adaptation of migrant workers (29%).

Table 5.6. Distribution of employers' answers to the question: "What are the most significant benefits and advantages of an organized recruitment scheme for your company (entity)?" (multiple choice question) (findings of the sociological survey, N = 473 employers)

Benefits and advantages of a organized recruitment scheme	Share of responses, %
Stability (migrant workers' focus on long-term employment with the employer, particularly in order to repay the loan)	39%
Guaranteed legal compliance (proper completion of pre-departure and licensing procedures by all recruited migrant workers)	37%
Selection quality (early disqualification of unsuitable workers)	37%
Cost savings (outsourcing of recruitment, pre-departure orientation, licensing procedures for sought-after migrant workers)	35%
Recruitment volumes (ability to recruit large numbers of migrant workers in a reasonable time)	30%
Follow-up support (communication between the organized recruitment agency, the employer, and migrant workers during the probationary period)	30%
Possibility of true adaptation of migrants (actual fluency in Russian at the required level and completion of the adaptation process)	29%
Preferential treatment in obtaining migrant worker's training as well as consulting, recruitment and employment services	25%
Do not believe that organized recruitment provides any benefits and advantages	6%

Only half of employers (7 or 54%) using organized recruitment in 2021 are fully satisfied with professional qualification of migrant workers from Central Asia. 1/3 (4 or 31%) are partly satisfied, and 1/6 (2 or 15%) are

[66] M. Kazakov. Halved salaries forced loans and the threat of deportation. A Moscow developer defrauds migrant workers from Uzbekistan // Present day. Asia. 19 March 2021. URL: *https://www.currenttime.tv/a/kak-migrantov-iz-uzbekistana-obmanula-stroitelnaya-kompaniya-pik-iz-moskvpik-/31157561.html*

not satisfied. The situation is even more complex with the migrants' knowledge of Russian: 1/4 (3 or 23%) - fully satisfied, 8 (62%) - partly satisfied, and 1/6 (2 or 15%) - not satisfied. As such, only 15 per cent of participating employers indicated dissatisfaction with the professional skills and language abilities of candidates. These figures indicate overall success with the selection process, but with room for improvement.

Russian Federation provide accommodation to migrant workers from Central Asia, 36 per cent give time-off on public holidays in the country of origin.

The sociological survey of employers demonstrates that employers still face major complications when filing registration papers for migrant workers. The main ones include: large fines for violating procedures of hiring foreign nationals when there are errors in the procedures (61%), requirement to notify the Ministry of Internal Affairs about the beginning and end of employment contracts within three days (59%), too many inspections by different authorities (53%).

Table 5.7. Distribution of employers' answers to the questions related to satisfaction with migrant workers from Central Asia (findings of the sociological survey, N = 13 employers)

Trends in headcount and demand for human resources	Completely satisfied	Partially satisfied	Not satisfied
Are you satisfied with the professional level of the Central Asian migrant workers your company (entity) recruited through an organized recruitment scheme?	54%	31%	15%
Are you satisfied with the Russian language fluency of the Central Asian migrant workers your company (entity) recruited through an organized recruitment scheme?	23%	62%	15%

Nevertheless, many experts report that, under current conditions, the organized recruitment model is designed to fully shift the responsibility and the burden of costs onto the employers, "leaving them with no real benefits." Around 6 per cent of employers see no advantages in organized recruitment.

Even though it is broadly considered that in the Russian Federation most of the employers must not and do not deal with the adaptation of labour migrants, the sociological survey proves that many employers are ready and do invest in workplace improvement, including for migrant workers, providing proper working conditions (dormitory, meals, medical aid, social benefits). Adaptation for migrants is usually arranged under the general corporate social policy of the hiring company. According to the sociological survey, 56 per cent of employers in the

1/4 of respondents mentioned employer's inability to register the foreign nationals at the place of stay, for example, dormitories owned by the employer (26%). Experts have also pointed to the underdevelopment of digital technologies for foreign migrant workers' registration. This has resulted in substantial labour costs and time spent by the employer's HR personnel roaming around governmental agencies to register migrant workers when an online system could save significant amounts of time and effort. Approximately 1/4 of the experts mention a complex and non-transparent migrant

Table 5.8. Distribution of employers' answers to the question: "What guarantees does your company (entity) offer to migrant workers from Central Asia?" (multiple choice question) (findings of the sociological survey, N = 473 employers)

Guarantees offered to migrant workers by the employer	Number of employers	Share of responses, %
Minimum wage compliance as per the applicable laws and regulations of the Russian Federation	312	66%
Right to rest as per the applicable laws and regulations of the Russian Federation and employment contract	283	60%
Accommodation as per applicable health and other regulations, safe working conditions, OHS compliance	265	56%
Right to have days off on their national holidays, subject to agreement with the employer	170	36%
The guarantees and compensations provided for by the applicable laws of the Russian Federation in the event of a migrant worker's death or injury as a result of a job-related accident or occupational disease	132	28%
Compensation by the company (entity) of the cost of returning a migrant worker or his/her body to the home country in the event of such migrant worker's death or injury as a result of a job-related accident or occupational disease	99	21%

Table 5.9. Distribution of employers' answers to the question: "What do you dislike most about the current foreign worker recruitment practices in the Russian Federation?" (multiple choice question) (findings of the sociological survey, N = 473 employers)

Answers	Number of employers	Share of responses, %
Significant fines for violating migrant worker employment regulations	289	61%
The need to notify the Ministry of Internal Affairs about the beginning and end of the contract	279	59%
Too many checks and inspections conducted by different authorities	251	53%
Complex (non-transparent) procedure for applying for and obtaining quotas for migrant workers to whom visa requirements apply	132	28%
Employer's inability to have a foreign migrant worker registered at the place of stay	123	26%

labour quota system for countries with visa restrictions.

Other common issues raised by experts include: "payments for the patent are made on a monthly basis which requires their monthly extension," "there is no way to schedule appointments in governmental agencies, so we go there every week," "sometimes, we wait in line for four hours," "there is no option to track the permit status online," "complex document workflow for foreign migrant workers," "difficult to register migrant workers."

ii. Employers in Kazakhstan

Recruitment of migrant workers from Central Asia by employers in Kazakhstan

The survey of employers in Kazakhstan revealed that over 50 per cent of respondents approach friends and acquaintances to seek migrant workers (29 respondents – around 51%). 14 per cent (8 respondents) headhunt via websites and social networks. Over 12 per cent (7 respondents) hire recruitment agencies to hire workers.

In organized recruitment from Central Asia, agents are involved — most often not dedicated companies but independent recruiters, possibly locals from Kazakhstan, who have connections with employers and travel to villages in Uzbekistan, Tajikistan and Kyrgyzstan to identify potential candidates for employment; their activities are unregulated; they are not responsible for the employer's credibility and cannot ensure that the workers' interests will be protected in the country of employment. There are often cases when such agents took away the migrants' documents forcing the latter to work for them to make up for the costs spent on travel and accommodation in the country of employment. A frequent case is 'human trafficking' primarily targeting those citizens of Central Asia who live in remote villages, have no knowledge of the law or languages in country of employment, and have low qualifications. There also exists an informal institute of agents or 'fixers' who, for a fee, will solve the problems associated with registering migrants in the Public Service Centres, Migration Police, governmental bodies. If employers engage such non-official agents, they bear added costs to engage migrant workers coupled with the risk that migrants recruited via an agent may have problems with registration and documents, and often have no money at the beginning of their stay in the country of employment. This means that employers have to deal with the legalization issues (document formalization, medical examinations, medical insurance, if necessary), otherwise fines are imposed. After that, issues such as temporary housing, meals, work clothes and commute need to be addressed. An employer who has a dormitory for workers is halfway through solving the problem. Those who don't have a dormitory have to spend extra on multiple items, as well as invest their own time or assign a staff member to supervise the migrants and guide them through settlement.

Another more frequent way to bring workers from Central Asia is to recruit migrants for domestic work by an individual employer via the Migration Service with the Kazakhstan Ministry of Internal Affairs (5 people max per employer). In this case, the employer must arrange for migrant workers to go through all the formalization procedures: First of all, to submit the documents and pay the interim tax. At the same time, some employers use this system to get around regulations: they register migrant workers as domestic workers but use them at industrial enterprises and other jobs for lower salaries.

The permit is issued if the worker provides the documents proving the right to stay in Kazakhstan, and payment of interim income tax for the period indicated in the permit application.

To get a permit, the migrant worker must provide, in person, the following documents to the Migration Police at the place of temporary registration in Kazakhstan:

- Application for issuance (renewal) of work permit per the form approved by the Regulations;
- Copy of receipt for the payment of interim personal income tax (original receipt is provided for verification);
- Copy of ID with a state border crossing stamp (original ID is provided for verification);
- Medical clearance in form No. 086/u approved by order of the acting Health Minister of Kazakhstan No. 907 dated 23 November 2010 'On approving the forms of primary medical documents of

health institutions' (recorded in the Register of Regulations under No. 6697);
- Confirmation of fingerprints and photograph having been taken – (no fingerprinting and photography required if the migrant worker provides details of the work permit received in the previous calendar year).

Where the worker is employed permanently or the job has not been finished within the agreed timeframes, the permit may need to be renewed.

The maximum duration of the permit cannot exceed twelve months. The new permit is issued to the migrant worker at least thirty calendar days after the previous permit expires. Upon the migrant worker's request, the permit is issued, renewed or rejected within one business day from the date of request.

Key problems associated with recruitment of migrant workers from Central Asia in Kazakhstan

Throughout the recruitment and employment process, employers indicated that they come across the following complications:

- It is hard for employers in Kazakhstan to find an experienced and skilled worker from other Central Asian countries since there is no developed network of official recruiters having a database of potential candidates, able to check the validity of training and professional development certificates, accredited to recruit candidates and guarantee the candidates' fitness for the job (test their real proficiency and skill adequacy for target occupation);
- According to employers, many candidates have inflated salary expectations not backed by their qualification (expertise, extraordinary proficiency, specialized knowledge, advanced skills). In this case, the employer is not ready to pay the expected salaries due to lack of confidence in the productivity and skills of the worker;
- When a migrant worker is employed on payroll, it is difficult to assess whether all his/her documents are legal and valid, since employers might not have the legal knowledge required to check the validity of the documents and cannot properly evaluate the professional skills, competence and knowledge of the candidate.

Interviews with employers overall indicated limited knowledge and a lack of transparency within the recruitment system itself requiring employers to take on certain risks that they may not be following regulations. Interviews clearly indicate that the establishment of a more formalized recruitment system and a simplified process as well as improved communication with employers is required.

Organized recruitment schemes in Kazakhstan are not yet fully established. The internal market protection requirements restrict the ability to attract unskilled personnel even when the labour market requires this. In Kazakhstan, the function of issuing work permits to migrant workers was transferred to the Public Service Centres in order to reduce the risk of corruption. The employees of central government authorities (Ministry of Labour and Social Protection of the Population, Ministry of Internal Affairs) are informed about interstate agreements with Uzbekistan, Tajikistan, Azerbaijan regarding migrant workers, but not yet familiar with the concept of organized recruitment. At the same time, there is an understanding that organized recruitment can facilitate legalization of labour migration and employment of migrant workers which, in many cases at the moment, occurs informally. The research demonstrated that Kazakhstan has not yet established special bodies or defined the scope of competence of government authorities and PRAs in organized recruitment of migrant workers. Organized recruitment has not yet been institutionalized as a mechanism for recruiting migrant workers to the labour market of Kazakhstan.

Organized recruitment in Kazakhstan: demand, constraints and mechanisms

As stated in a number of interviews as well as in the literature review, regular pathways for labour migration to Kazakhstan tend to be focused on highly skilled occupations and are limited in number. Respondents noted that there was a particular need for migrant workers and an organized recruitment scheme in Nur Sultan and Northern Kazakhstan which, due to geographic distance, do not benefit from shorter term cross border movements as do the cities in Southern Kazakhstan. Shifts in mobility and border closures during the COVID pandemic have only served to increase labour shortages in many sectors.

There was consensus among many interviewees that this lack of procedures to legally and easily bring in needed workers contributes to the irregular hiring of migrants as well as the misuse of other forms of work permits as noted above. In the opinion of a number of surveyed employers employment centres in the country could facilitate in the process of international recruitment as well, in cases where national qualified staff are not available to fill vacancies. Such support could include issuing vacancy lists, facilitating employer searches and assisting in navigating the paperwork process for international recruitment. This sentiment was also shared by a representative of the Department of Employment in East Kazakhstan who stated that employment centres "could act as intermediaries between our employers and those entities in other countries that provide organized recruitment services, if we establish contact, then conclude contracts and maintain records."

Respondents noted numerous challenges with the current international recruitment system including a lack of clarity on procedures and an unwillingness of employers to pay the required fees for the regular employment of foreign workers. Several respondents also noted a duplication of procedures requiring permits to be issued both by the Ministry of Interior and the Department of Employment. There is thus a need to assess and streamline procedures so that, when and where necessary, employers are able to easily bring in foreign workers in a regular and organized manner.

The "Work Without Borders" digital project, launched in July 2021, was highlighted as a promising initiative which could potentially be expanded beyond EEU Member States to include Uzbekistan and Tajikistan. The online job matching system links employer vacancies with jobseekers with relevant skills from across the EEU. It was suggested that, beyond the online system, employment centres in Kazakhstan could also take on a more proactive role to encourage and assist employers in using the system and navigating the required paperwork for international recruitment.

As is clear from the above, Kazakhstan has not yet established either a regulatory framework or institutional measures to support implementation of organized recruitment of migrant workers from Central Asian countries. At the same time, the respondents are aware of the need to create such a mechanism for attracting migrant workers in alignment with the country's labour market needs and development objectives, while also protecting Kazakh workers. Respondents recognized that the establishment of a functioning international recruitment system will reduce the level of irregular migration and employment currently existing in the country and better protect the rights and ensure the safety of migrant workers in Kazakhstan as well as Kazakh workers.

iii. Returnees and prospective migrant workers in Central Asia

Overall, the survey of prospective migrant workers and returnees indicated insufficient level of knowledge about organized recruitment opportunities. Less than half of respondents are interested in engaging with SRA/PRAs. However, certain variances were identified both between returnees and prospective migrants, as well as between the three Central Asian countries.

In the total sample of the three countries, 54 per cent of returnee migrants indicated that they did not know about the services of public and private recruitment agencies (SRA and PRAs) in their countries, in the Tajik sample the share was much higher than in other countries (60%), compared to 48 per cent in Kyrgyzstan and 54.6 per cent in Uzbekistan stating that they did not know about these services.

The preferences of finding employment through informal channels and personal connections prevail in 49 per cent of the total sample of returnees for the three countries. The highest share of such responses was in the Tajik sample (55.7%), compared to 49.7 per cent of the Kyrgyz sample and 41.4 per cent of the Uzbek sample.

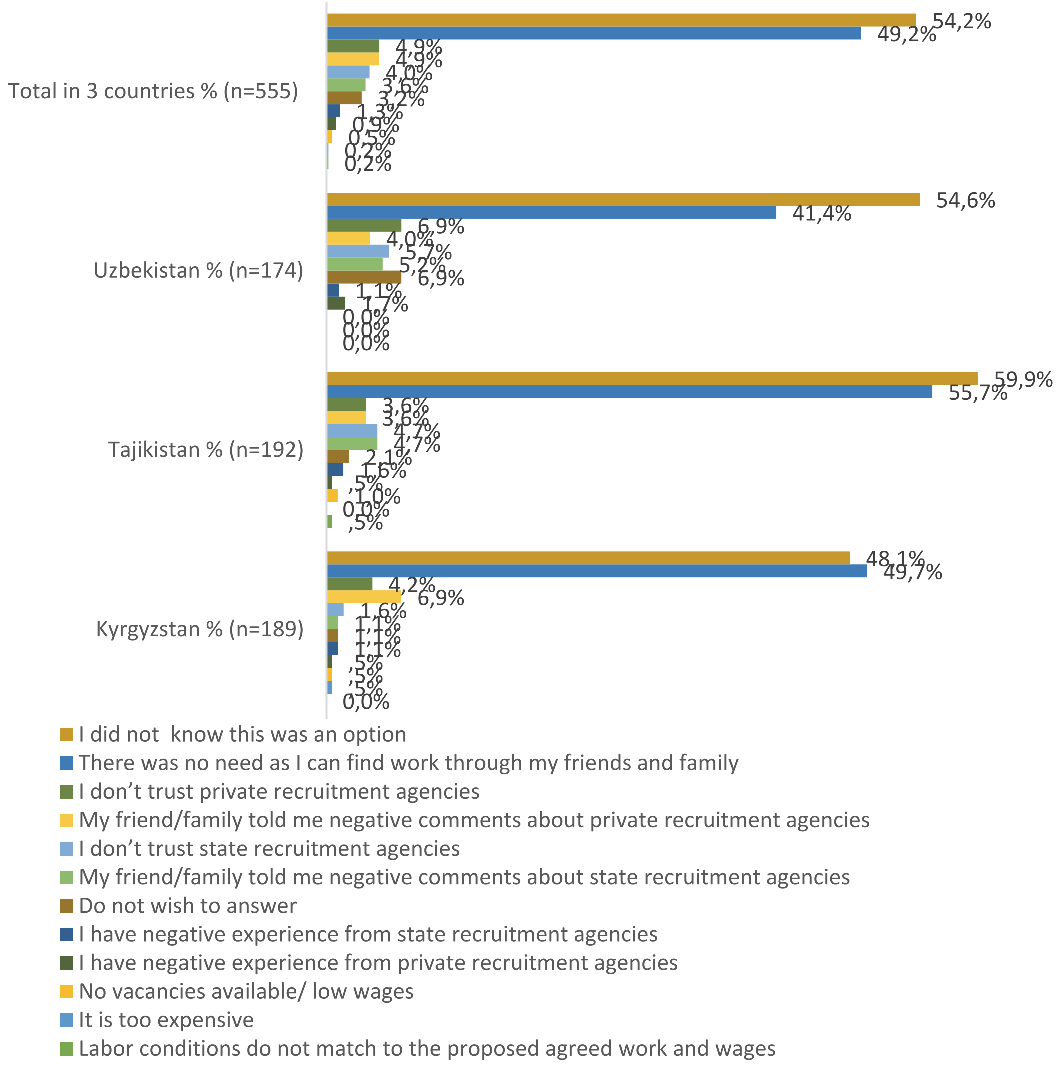
Among those who did not know of recruitment agencies, the share of women is higher, while there are more men than women among those who found jobs through relatives and friends, and this trend is more typical of the Kyrgyz returnees. While the mistrust of state and private recruitment agencies is higher among Uzbek returnees (5,7 per cent of the public and 6,9 per cent of the private recruitment agencies) and appears to be higher among female returnees. However, across the spectrum, distrust of both PRAs and SRAs has appeared to be very low, indicating that lack of trust is not a major issue for migrants in using the services of recruitment agencies.

Returnees had found jobs mostly through informal private channels. More than half of the returnee migrants had found jobs through personal connections (family, friends, relatives) before their departure and 40 per cent found jobs through personal connections upon arrival in the Russian Federation and Kazakhstan. The Tajik returnee migrants (62 per cent of the Tajik sample) were more likely to secure jobs before departure, while the Kyrgyz returnee migrants (46 per cent of the Kyrgyz sample) were more likely to find jobs upon arrival. This difference is likely due to Kyrgyzstan's membership in the EEU making employment options easier for Kyrgyz citizens upon arrival in the Russian Federation.

Very few of the respondents returnee migrants found jobs through organized recruitment and even fewer through state run recruitment services. The highest share of returnee migrants who found a job through an individual broker/intermediary were in Uzbekistan (3.7 per cent of the Uzbek sample) and 2 per cent of the Uzbek sample found work through individual broker/ intermediary in the Russian Federation and Kazakhstan. Also 3.2 per cent of the Uzbek returnee migrants found employment through a State Recruitment Agency in Uzbekistan, and 1.6 per cent - through a private recruitment agency in Uzbekistan. In the Tajik sample 2.6 per cent found work through individual broker/intermediary in the Russian Federation and Kazakhstan, and only 1.5 per cent of the Tajik sample found work abroad through individual broker/intermediary in Tajikistan.

In the Kyrgyz sample, 2 per cent found employment on their own, 1.5 per cent found employment through the Internet, and 1.5 per cent found employment through private recruitment agencies in Kyrgyzstan. Only 0.5 per cent of the Kyrgyz sample indicated that they were employed through a State Recruitment Agency.

Figure 5.5. If you did NOT go through a state/private recruitment agency in your home country to find employment, please state why.



More than half of returnees (54%) intend to go back to work in the Russian Federation or Kazakhstan, including 61 per cent in the Tajik sample, 51 per cent in the Uzbek sample, and 49.5 per cent in the Kyrgyz sample.

Of the 46 per cent who do not intend to re-emigrate for work, 23.7 per cent do not want to go because they have found work at home, 12.2 per cent - for health reasons, 6 per cent - because of age, 5 per cent - because they were deported from the Russian Federation or Kazakhstan (in the “blacklist”).

Of those who plan to re-migrate to the Russian Federation and Kazakhstan for employment (a total of 313 respondents), 59 per cent plan to find a job through personal connections, family and friends before they leave, 29 per cent - through personal connections once in the Russian Federation or Kazakhstan, 27.5 per cent - through SRAs, 2.6 per cent - through state centres for vocational training and 2.6 per cent - via PRAs, 2.2 per cent - via individual intermediaries in the Russian Federation and Kazakhstan, 1.9 per cent - via Diaspora in the countries of migration, 1.3 per cent - via an individual intermediary in their own country, 1.3 per cent - via private centres for vocational training and 1.3 per cent - “will go back to my previous job”.

The highest proportion of intentions to look for a job through personal contacts before arriving and after arriving in the Russian Federation and Kazakhstan is among the Kyrgyz (83.5% and 40%) and Tajik (73% and 26%) samples, and in the Uzbek sample only 17.3 per cent before arriving in the Russian Federation and Kazakhstan and 20 per cent after arriving.

The highest proportion of intentions to look for work through SRAs is among the Uzbek returnees with 63.3 per cent, compared to 14.4 per cent among the Tajik returnees and 7.2 per cent among the Kyrgyz returnees.

We thus see a distinct difference between Uzbek returnees and those in Kyrgyzstan and Tajikistan, which is paralleled in the responses of prospective migrants

Figure 5.6. How did you identify/find your employment?

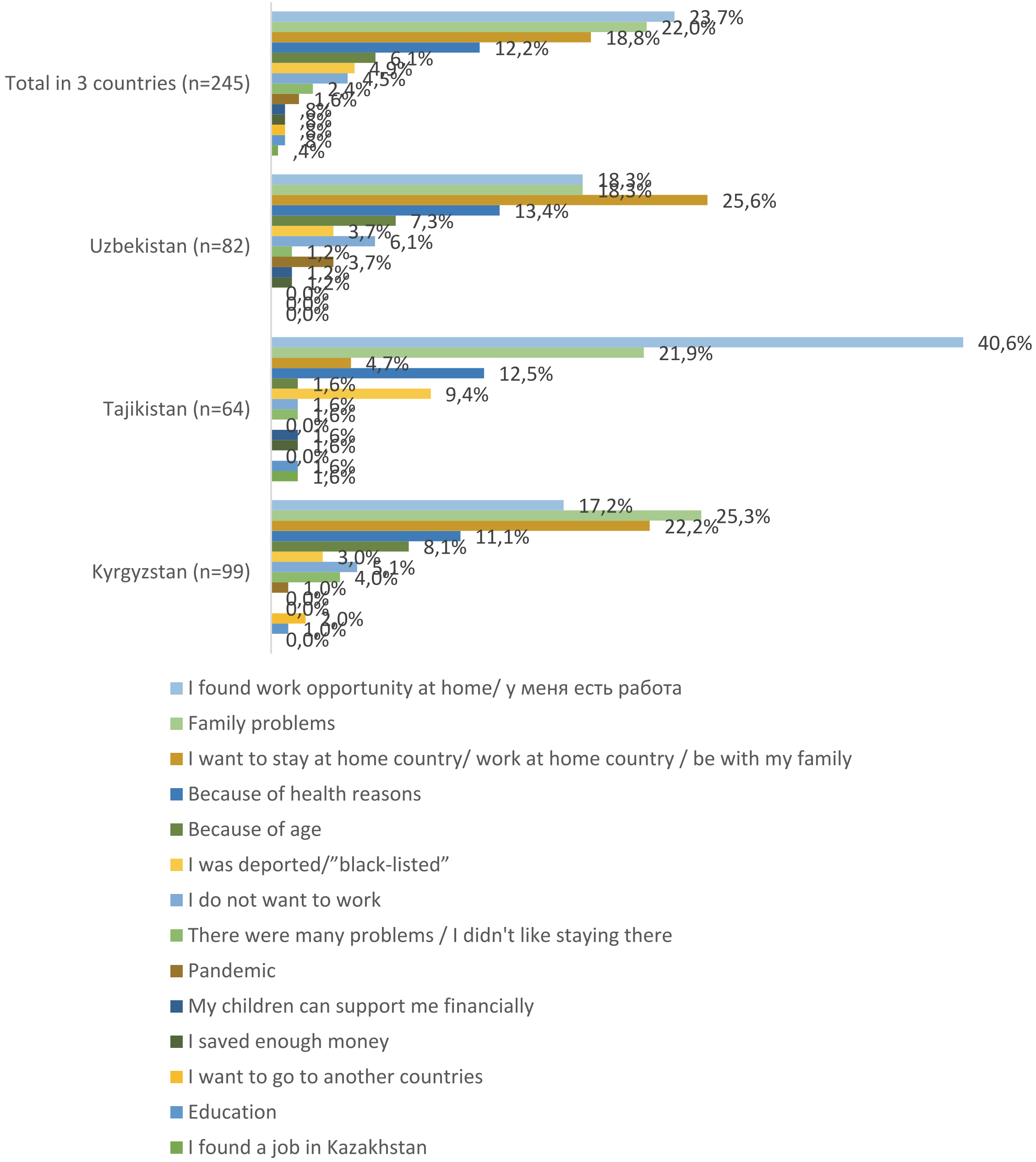
from these countries, with Uzbek migrants being much more likely to use SRA/PRA services to find employment through organized recruitment mechanisms. This high frequency of Uzbek returnee migrants turning to the state recruitment services may have something to do with the reliability and functionality of the SRAs as well as the communication of these opportunities. This also seems to demonstrate that, when developed effectively, there is a market for organized recruitment services among prospective migrants in Central Asia.

Results of the focus-group discussions also demonstrate these issues as potential reasons for the discrepancy of interest in SRAs across the three countries:

- The low capacity of the private recruitment agencies (which leave SRAs in a near monopoly position) in Uzbekistan.
- Perceived better effectiveness of the state regulation and potential to resolve migrants' issues with the authorities and companies in the Russian Federation and Kazakhstan in regards to inter-governmental agreements and allowances, contracts, visas, work permits, tax, pensions, compensations, entry blacklisting cross-check and cancellations.
- Stronger compliance and submission to the state and its regulations than among the Kyrgyz and Tajik respondents/participants of FGD.

When it comes for job search among prospective migrants, the prevailing approach is again to search through personal connection (family, relatives, friends) prevail especially so among the Kyrgyz prospective migrants (73%) and the Tajik prospective

Figure 5.7. Please indicate why you do not wish to work again in the Russian Federation/Kazakhstan?



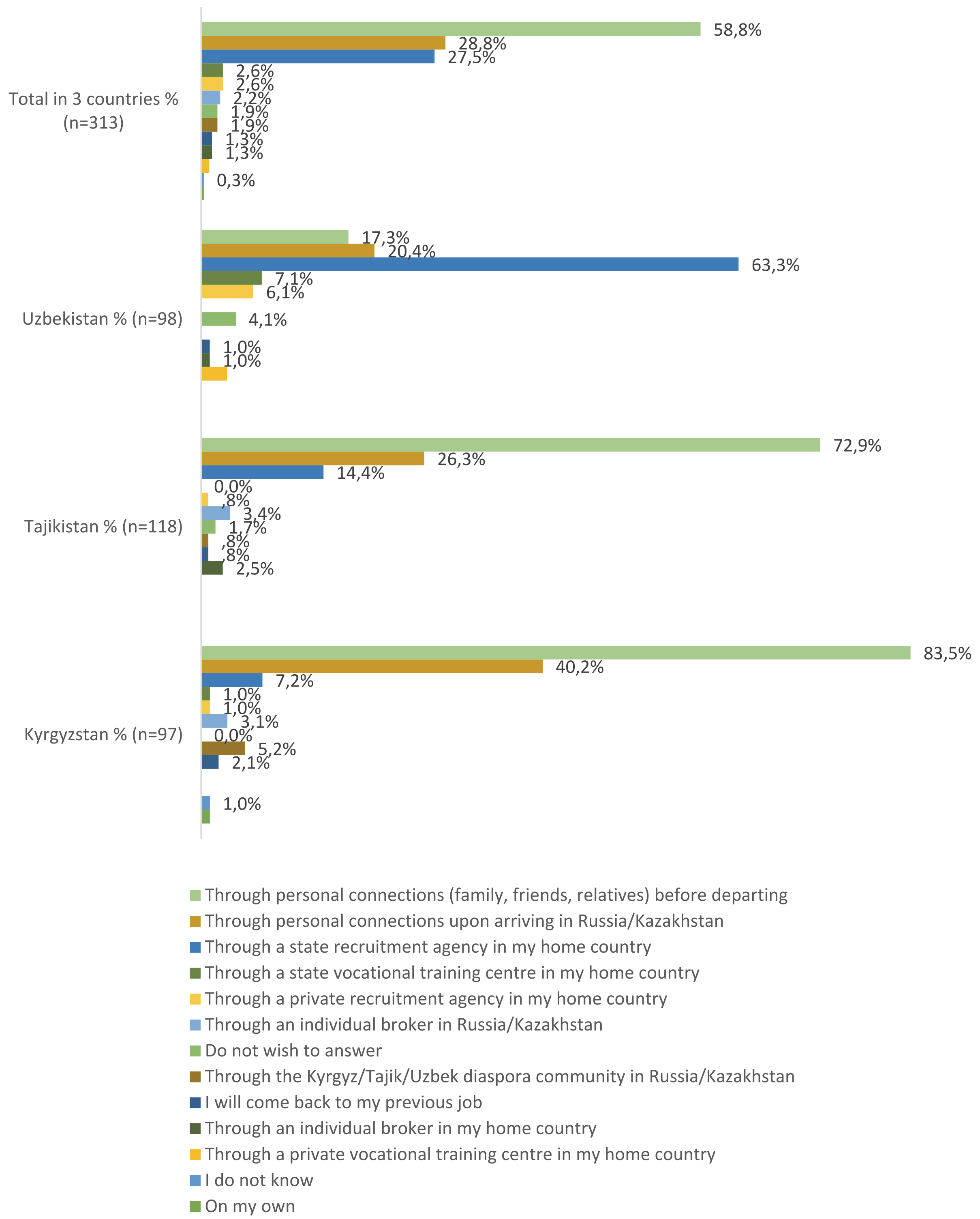
migrants (64%). While notably, only a quarter of Uzbek prospective migrants have this preference. That is probably due to the fact that 64 per cent of Uzbek prospective migrants are planning to get employment through the SRAs (state recruitment agencies), while the Kyrgyz and Tajik prospective migrants show much less interest (15% and 5%) respectively.

Despite these differences, in all three countries there is an increased interest in the use of SRAs and a related decline in the planned use of social networks to seek employment.

As also confirmed by the focus-group discussion data, PRAs are more actively in use in Kyrgyzstan than in the other two countries, with use of PRAs planned by 8 per cent of Kyrgyz prospective migrants, 4 per cent of Uzbek and only 1 per cent of Tajik prospective migrants.

Overall, there seems to be good trust in recruitment agencies among prospective migrants with only a small percentage suggesting that they do not trust either SRAs or PRAs. Indeed, about 11,6 per cent of the total sample do not trust the PRAs; in the Uzbek sample – 12,3 per cent, in the Kyrgyz sample – 13,5 per cent, and in the Tajik sample such answers were 9,4 per cent. Almost 7 per cent of the Kyrgyz sample

Figure 5.8. How would you look for a job this time?

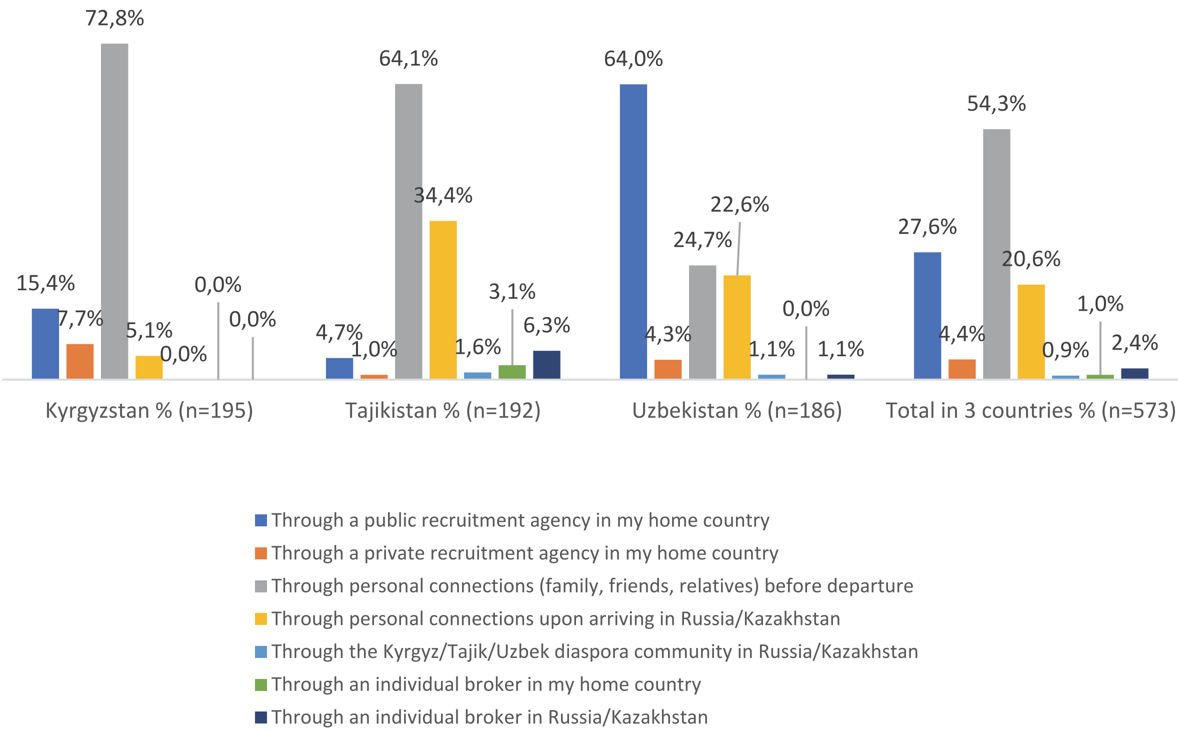


reported that their family members/relatives had negative opinions about PRAs, the same was reported by almost 4 per cent of the Uzbek and Tajik samples.

6,5 per cent of the total sample do not trust SRAs, with the highest share of those who distrust SRAs in the Uzbek sample (14%), 6,7 per cent among Tajik, and 3,4 per cent among Kyrgyz.

While issues of trust do not seem to play a role in the use of SRA/PRA services there does appear to be a lack of knowledge or awareness about the services or advantages of using SRA/PRAs. 32.2 per cent of the total sample indicated that they did not know about the possibilities of applying to SRA and PRA services, among them the largest number of migrants from the Tajik sample – 55 per cent, as well as from the

Figure 5.9. How are you planning to find employment in the Russian Federation/Kazakhstan?



Uzbek sample – 42 per cent, least of all from the Kyrgyz sample - 5.4 per cent.

62.4 per cent of the total sample of prospective migrants did not consider it necessary to use the services of SRA and PRA in their countries to find a job, as they could find a job through their friends and family members, among them 86.5 per cent in the Kyrgyz sample, 49.7 per cent per cent in the Tajik sample, and 33.3 per cent in the Uzbek sample.

3.7 per cent of the total sample do not want to use services of PRAs as they are associated with negative experiences of the respondent, among them 4.1 per cent of the Kyrgyz sample, 4 per cent of the Tajik sample and 1.8 per cent per cent of the Uzbek sample.

3 per cent of the total sample of prospective migrants do not want to use the services of PRA because their friends and family members spoke negatively about PRA, in the Tajik sample 6.0 per cent, in the Uzbek sample 1.8 and in the Kyrgyz sample 0.7 per cent think so.

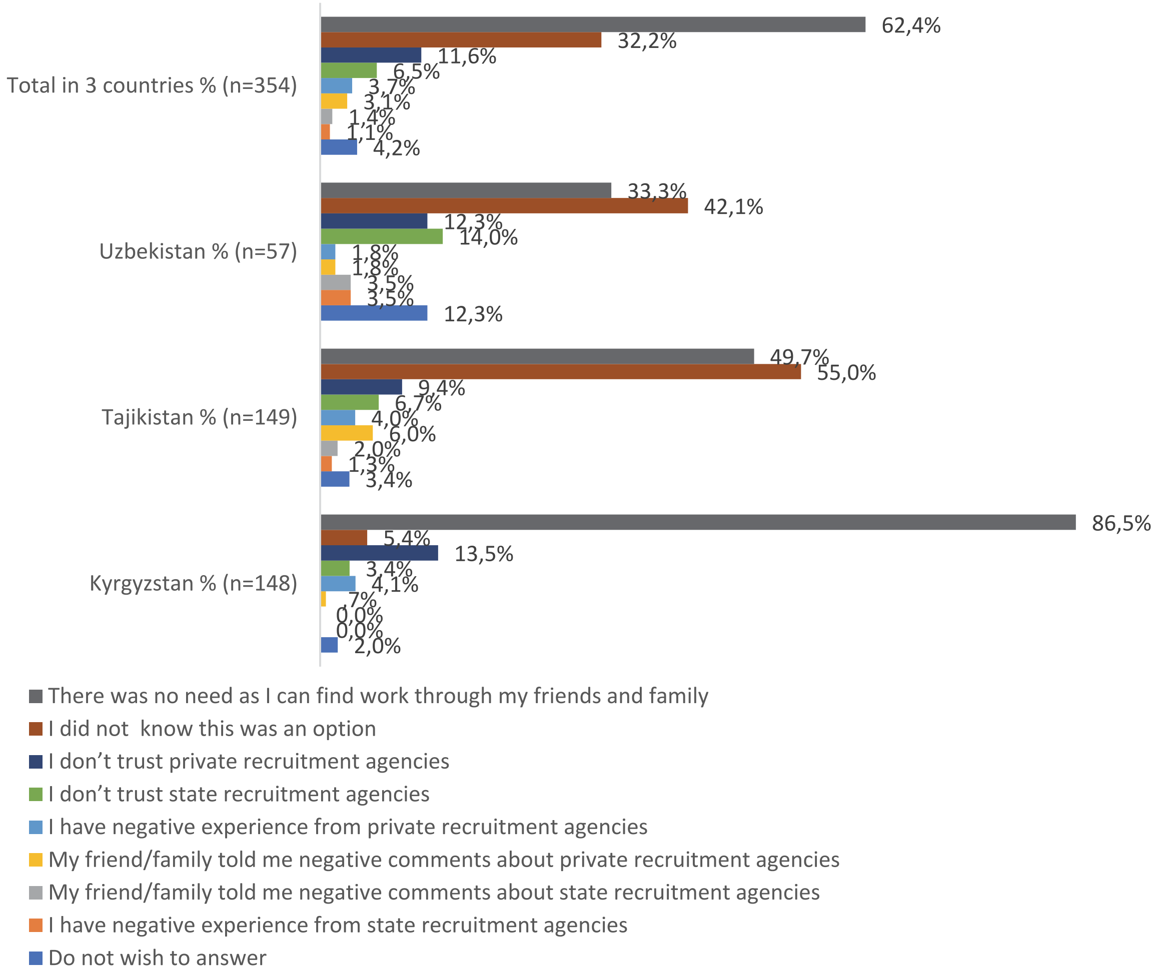
The gender cross-tabulation for all three countries (with 354 selected answers) demonstrates a higher mistrust of recruitment agencies among women compared to men (in some cases on a ratio of 3:1) and a higher share of those who did not know of services of recruitment agencies among men compared to women (by almost 50 per cent). The mistrust of the recruitment agencies is highest among the Kyrgyz prospective migrants (18 per cent among women and 11 per cent among men in the Kyrgyz sample do not trust private recruitment agencies).

Women are consistently better informed than men among prospective migrants about the availability of recruitment agencies in all three countries. While among those who did not know of recruitment agencies as an option to find employment in the Russian Federation and Kazakhstan, the highest share was in the Tajik sample. Women prospective migrants in the Kyrgyz and Uzbek samples had higher share of those who chose "There was no need as I will find work through relatives and friends".

The most striking gender disparities by country are among those who did not know about the recruitment agencies as an option. For example, there were twice as many men among the prospective migrants who did not know about the recruitment agencies as an option for job search.

Prospective migrant workers in all three countries indicated the most valuable services SRA/PRAs could provide to them. These responses indicate the types of priorities, in terms of service delivery and communications, that SRA/PRAs should focus on in order to encourage prospective migrants to switch their recruitment methods from informal recruitment networks to organized recruitment processes. The following can be considered to be the most important (useful) services that SRAs and PRAs could optimize in order to encourage uptake among prospective migrants:

Figure 5.10. Why would you NOT go through a state/private recruitment agency to find employment?



"Help in finding a job quickly" - in the total sample of 77.8 per cent, of which the highest weight in the Kyrgyz sample - 86.7 per cent, in the Uzbek sample - 76.2 per cent, and in the Tajik sample - 50.0 per cent.

"Assistance in finding a job with minimal costs" - in the total sample of 58.2 per cent, of which in the Kyrgyz sample the largest share – 62 per cent, in the Uzbek sample – 58 per cent, in the Tajik sample - 37.5 per cent.

"Assistance in contract negotiations" - in the total sample of 53.8 per cent, of which in Kyrgyz sample the largest specific weight was 86.7 per cent, in Uzbek sample - 42.9 per cent, in Tajik sample - 12.5 per cent. "General administrative assistance in processing documents" - in the total sample of 53.8 per cent, of which in the Kyrgyz sample - 68.9 per cent, in the Tajik sample - 62.5 per cent, in the Uzbek sample - 46.7 per cent.

"Help to check the legality and reliability of the employer and employment" - in the total sample of 53.2 per cent, of them in the Kyrgyz sample - 71.1 per cent, in the Uzbek sample - 49.5 per cent, and in the Tajik sample there was no such answer.

"Legal assistance on migrants' rights" - in the total sample of 53.2 per cent, of which in the Kyrgyz sample 82.2 pe cent, in the Uzbek sample 42.9 per cent, and in the Tajik sample 25.0 per cent.

"Legal assistance in receiving services from the state (pension, social protection, childcare program)" - in the total sample 47.5 per cent, of which in the Kyrgyz sample - 66.7 per cent and in the Uzbek sample - 42.9 per cent, in the Tajik sample there were no such answers.

Looking at these results four key priorities are illuminated: (i) the speed at which a job can be identified and the recruitment process can be completed is critical; (ii) migrants are cost-sensitive and are unlikely to pay substantially more for organized recruitment than they would for informal processes; (iii) assistance in contracts and navigating administrative systems and completing paperwork is considered a key advantage of SRA/PRAs; (iv) there is particular interest in receiving information and support on legal aspects of their stay and employment in the country of destination.

Figure 5.11. Crosstab Gender to "Why would you NOT go through a public/private recruitment agency to find employment?" % (n=148 Kyrgyzstan)

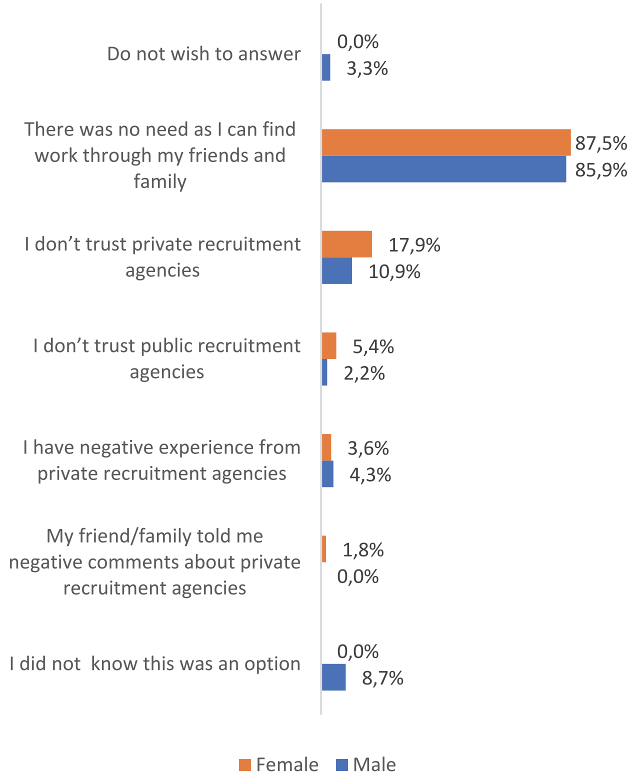


Figure 5.12. Crosstab Gender to "Why would you NOT go through a public/private recruitment agency to find employment?" % (n=149 Tajikistan)

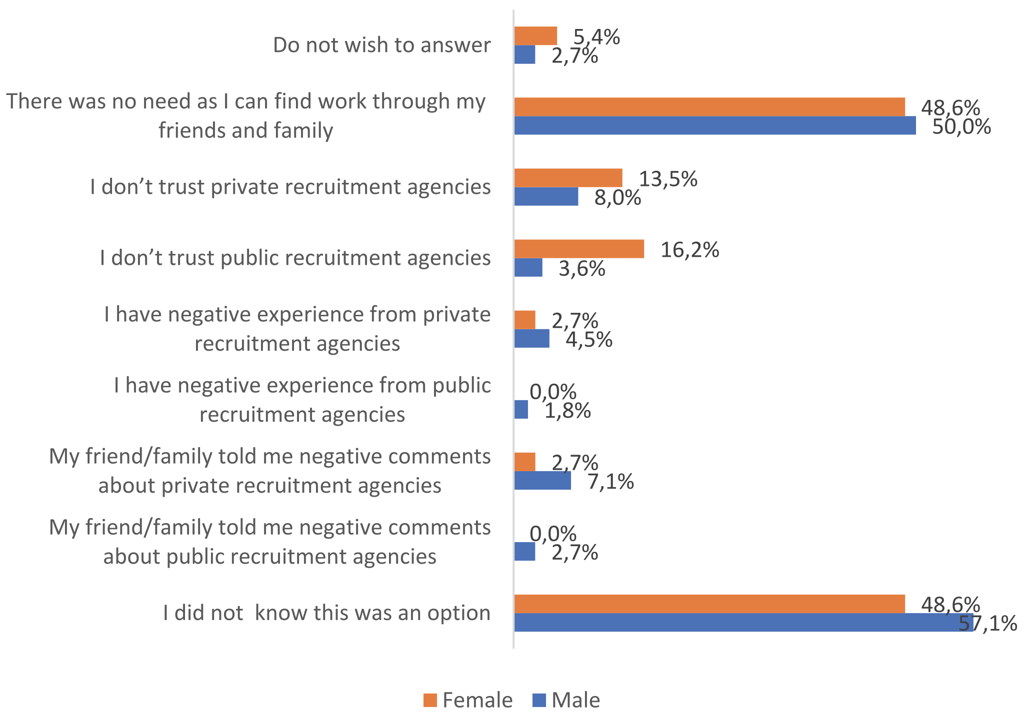


Figure 5.13. Crosstab Gender to "Why would you NOT go through a public/private recruitment agency to find employment?" % (n=57 Uzbekistan)

Thus, the ideal SRAs and PRAs are 1) quick, 2) cost-effective, 3) ensure legal protections and reliability of employer, 4) manage the paperwork and administrative process, 5) provide legal assistance on migrants' rights issues for preventive measures such as pre-departure training, cooperation with the state, NGOs in countries of destination to uphold migrants´ rights in case of violence, exploitation and abuse.

Possible growth sectors that could be useful for the PRAs to watch regarding job availability

Among those returnees who had found jobs through relatives and friends (informally) there were more of those who had experience of working in such sectors as construction (52%), hospitality services (64%), wholesale trade (45%), food processing (54%), and manufacturing (49%). Among those who did not know of an option to find jobs through recruitment agencies, there were more returnees with experience in such sectors as fishing (100%), agriculture (80%), construction (54%), wholesale trade (57%), manufacturing (61%), food processing (54%), as well as domestic work and public administration services such as cleaning, landscaping (60%), human health and social work (71%).

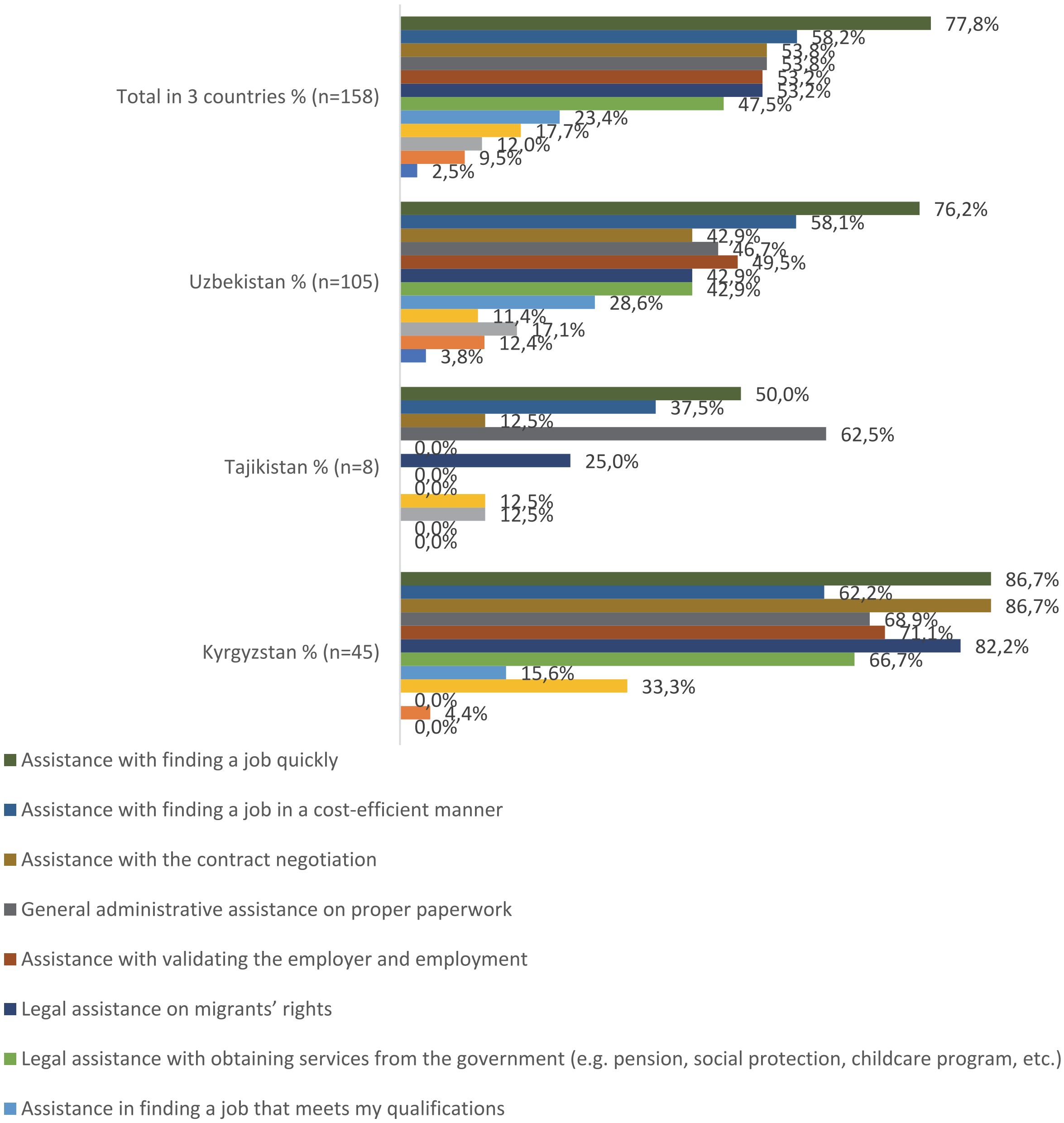
As such, communication and awareness raising on opportunities for organized recruitment within these sectors may allow for high rates of user interest. While searching for employment, returnees have certain perceptions that steer them away from the use of recruitment agencies. A cross tabulation on how many have actually used private or public recruitment agencies underline the clear lack of awareness about these services 32 per cent of the sample did not know how to answer this question and 35 per cent did not wish to answer.

Reasons behind decision-making regarding employment in particular destination countries and sectors are also important to consider for recruitment agencies' optimal packaging of their offers in order to identify what types of employers and offers may be of most interest. While answering the question about the most important factors that convince returnee migrants to take on a new job in country of destination, the most common responses included:

"My acquaintance already works there" - 54.3 per cent (in the Uzbek sample the share of this answer is the highest – 73 per cent, in the Kyrgyz sample – 52 per cent, in the Tajik sample – 40 per cent);

"Salary and guarantee that the salary will be paid" - 45.5 per cent (in the Tajik sample the share of this answer is the highest - 54.5 per cent, in the Uzbek sample - 48.6 per cent, in the Kyrgyz sample - 33.5 per cent); "How

Figure 5.14. What services would you consider to be most useful/needed from a public/private recruitment agency in your home country?



quickly I can start working" - 36.5 per cent (in Kyrgyz and Tajik samples the share of this answer is the highest - 38.7 per cent and 38.4 per cent respectively, and in Uzbek sample – 32 per cent);

"The job corresponds to my skills and experience" - 34.7 per cent (in the Uzbek sample - 50.3 per cent, in the Tajik sample - 29.3 per cent, and in the Kyrgyz sample - 25.8 per cent).

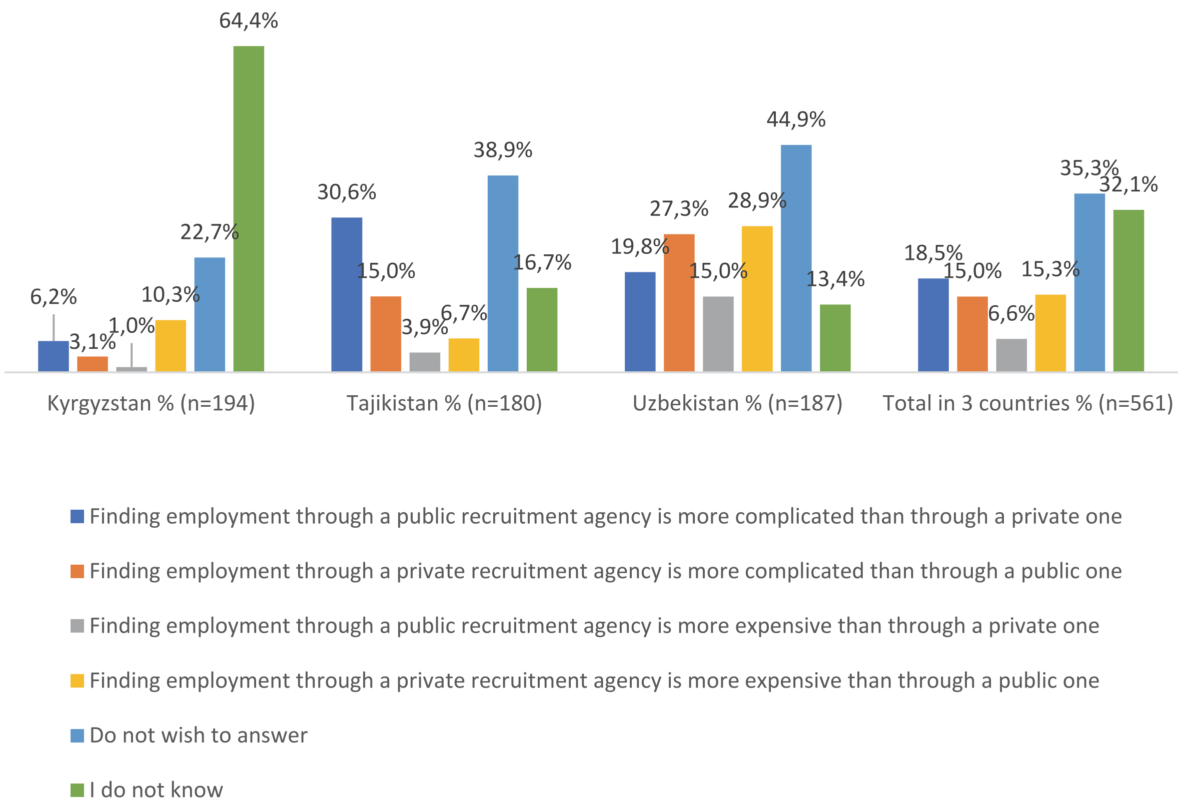
Only one-sixth (17,4%) of the overall sample in the three countries noted that they did not have any challenges while working in the Russian Federation/Kazakhstan, among them 22 per cent Kyrgyz returnee migrants, 14,5 per cent - Tajik, and 15,7 per cent - Uzbek. Over a quarter of respondents (26%) suffered from working hours that were longer than agreed. A similar share of the total sample (24%) had challenging situations due to language barriers. More than a fifth (22%) suffered from deteriorating health due to work conditions, and 17 per cent - had salaries lower than what was indicated in the contracts. There were 12 per cent of respondents in all three countries that reported workplace discrimination and abuse and 6 per cent of the total sample reported having had difficulties integrating in the local communities in the Russian Federation/Kazakhstan.

As such SRAs and PRAs can enhance the value of their services to migrant workers by clarifying contract issues and ensuring good working conditions are provided by partner employers.

Table 5.10. Crosstabulation. Sector employment experience to "If you did NOT go through a public/private recruitment agency in your home country to find an employment, why was it so?"

	Sector employment experience												
If you did NOT go through a public/ private recruitment agency in your home country to find an employment, why was it so?	Agriculture/ forestry	Construction	Fishing	Manufacturing/other factory work	Food processing	Transportation (marshrutka minibus/taxi/bus/ motor bike	Wholesale and retail trade (bazaar)	Repair of motor vehicles & motorcycles	Hotels/ Accommodation & Restaurants	Domestic work	Public administrative and support services, including cleaning, landscape care, and other	Human health and social work activities	Arts, entertainment (including performances) and recreation
I did not know this was an option	80.0%	54.0%	100.0%	60.5%	53.8%	46.4%	57.1%	75.0%	36.4%	50.0%	60.0%	71.4%	
My friend/family told me negative comments about public recruitment agencies		2.8%			2.6%	3.6%	8.2%		4.5%	8.3%	3.3%		
My friend/family told me negative comments about private recruitment agencies		5.7%			2.6%	7.1%	8.2%		4.5%	8.3%	6.7%		
I have negative experience from public recruitment agencies		2.4%			2.6%				2.3%				
I have negative experience from private recruitment agencies		.9%		4.7%					0.0%			14.3%	
I don't trust public recruitment agencies		5.7%		2.3%	2.6%	7.1%	6.1%		4.5%	2.8%			
I don't trust private recruitment agencies		5.7%		4.7%	5.1%	10.7%	6.1%		2.3%	2.8%		14.3%	
There was no need as I can find work through my friends and family	25.0%	51.7%		48.8%	53.8%	42.9%	44.9%	37.5%	63.6%	38.9%	46.7%	42.9%	100.0%
Do not wish to answer		1.4%			2.6%	7.1%	6.1%		2.3%	13.9%	3.3%		
Labor conditions do not match to the proposed agreed work and wages		.5%											
No vacancies available/ low wages		.9%					2.0%						
It is too expensive										2.8%			

Figure 5.15. What is it like to get employment through a public/private recruitment agency in your home country?



When it comes to ways of solving problems, 53.7 per cent of respondents in the total sample chose the answer "went back home", while 22.8 per cent spoke with their employer about problems and concerns, as many as 19 per cent refused to answer, and 8 per cent found another job. Those who went home were more in the Kyrgyz sample (65.6%), and less in the Tajik sample (47%). The highest proportion of those who solved the problem by talking to the employer was in the Tajik sample - 42.3 per cent, compared to 16 per cent in the Uzbek sample and 9 per cent in the Kyrgyz sample. In addition, 2.5 per cent of the Kyrgyz sample, 1.8 per cent of the Uzbek sample and 1.7 per cent of the Tajik sample solved problems with employers by turning to their cultural and ethnic diasporas in the Russian Federation and Kazakhstan.

The results clearly indicate that workers have challenges in raising issues with employers. Implementation of better complaints mechanisms or NGO services to support workers should be considered in order to address this issue.

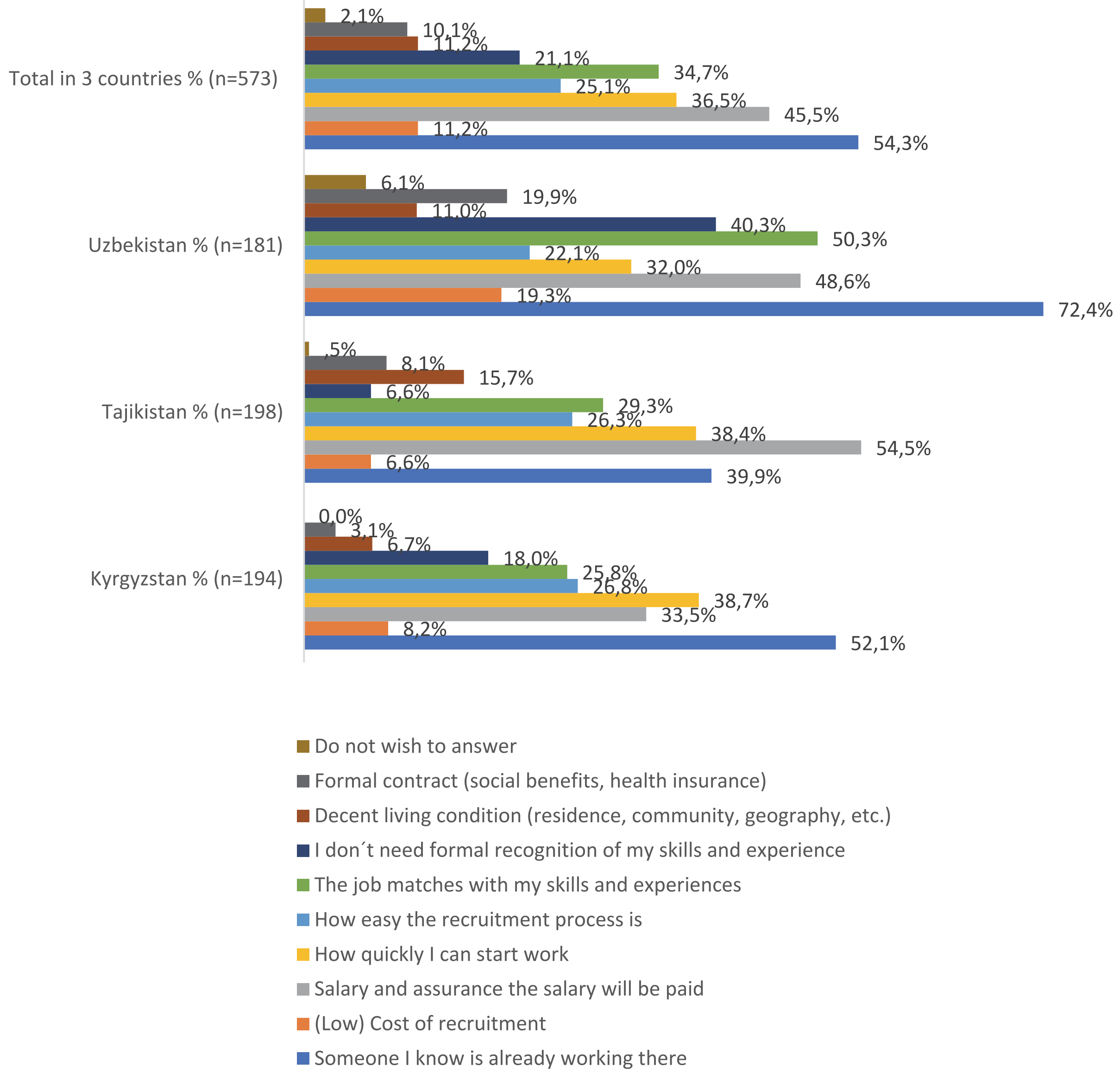
iv. Recruitment agencies & vocational training centres in Central Asia

The role of vocational training centres in labour migration

Kyrgyzstan

In Kyrgyzstan there are several pivotal roles that vocational education and training (VET) have had during roughly the two periods that they seem to have been in their growth period. The first one was during the Soviet Union when the specialized vocational training and technical vocational training schools were developed and supported to supply professional labour to the industrial, agricultural, transportation, mining and other economic sectors throughout the Soviet Union and thus in all the three Central Asian countries studied. The second growth period of VET development is observed during the last twenty years, or since the second decade of Kyrgyzstan's independence from the former Soviet Union. In addition, to the State-funded vocational training schools there are now a rising number of private vocational training centres for various professional, managerial, and technical skills in Kyrgyzstan than was ever imagined in the Soviet vocational schooling. These include ICT skills, accounting, management with specific focuses, logistics, a variety of new technological jobs, optimized with improved technologies and equipment, scientific applications of a variety of innovations.

Figure 5.16. When considering job opportunities in the Russian Federation/Kazakhstan, what were the most important factors, which convinced you to take the job?



However, a 2009 ILO report on Labour Migration and Productive Utilization of Human Resources highlighted the shortages of the VET system in Kyrgyzstan in terms of its alignment with actual skills demand in the labour market either in Kyrgyzstan or in destination countries, as well as limited engagement/collaboration with the private sector. Updating of the VET curricula and the national qualification standards as well as targeting protection of the rights of vulnerable population and youth were among the key recommendations of the report. The prevalence of informal employment among Kyrgyz migrant workers was also confirmed by the ILO, Kyrgyzstan Labour Market Rapid Assessment.[67]

Dynamics of public and private recruitment agencies and their interaction with vocational education and training had been studied in the research by EADB, Labour Migration and Labour-Intensive Industries in Kyrgyzstan and Tajikistan: Opportunities for Human Development in Central Asia.[68] Skills improvements through public/private partnership between vocational training centres and recruitment agencies was studied in the OECD, Improving Skills through Public-Private Partnerships in the Kyrgyz Republic.[69]

Tajikistan

Skills development and vocational training offered to Tajik migrants in Tajikistan has been studied by IOM (2017), ADB (2018), ADB (2019a) and ADB (2020). The dynamics of public and private recruitment agencies and their interaction with vocational education and training

[67] URL: https://www.ilo.org/wcmsp5/groups/public/---europe/---ro-geneva/---sro-moscow/documents/publication/wcms_761673.pdf

[68] URL: https://eabr.org/upload/iblock/0b9/report_ca_labour_migration_and_labour_intensive_sectors_full_rus.pdf

[69] URL: https://www.oecd.org/eurasia/competitiveness-programme/central-asia/ImprovingSkills%20(3).pdf

Figure 5.17. How did you resolve this issue/challenge?

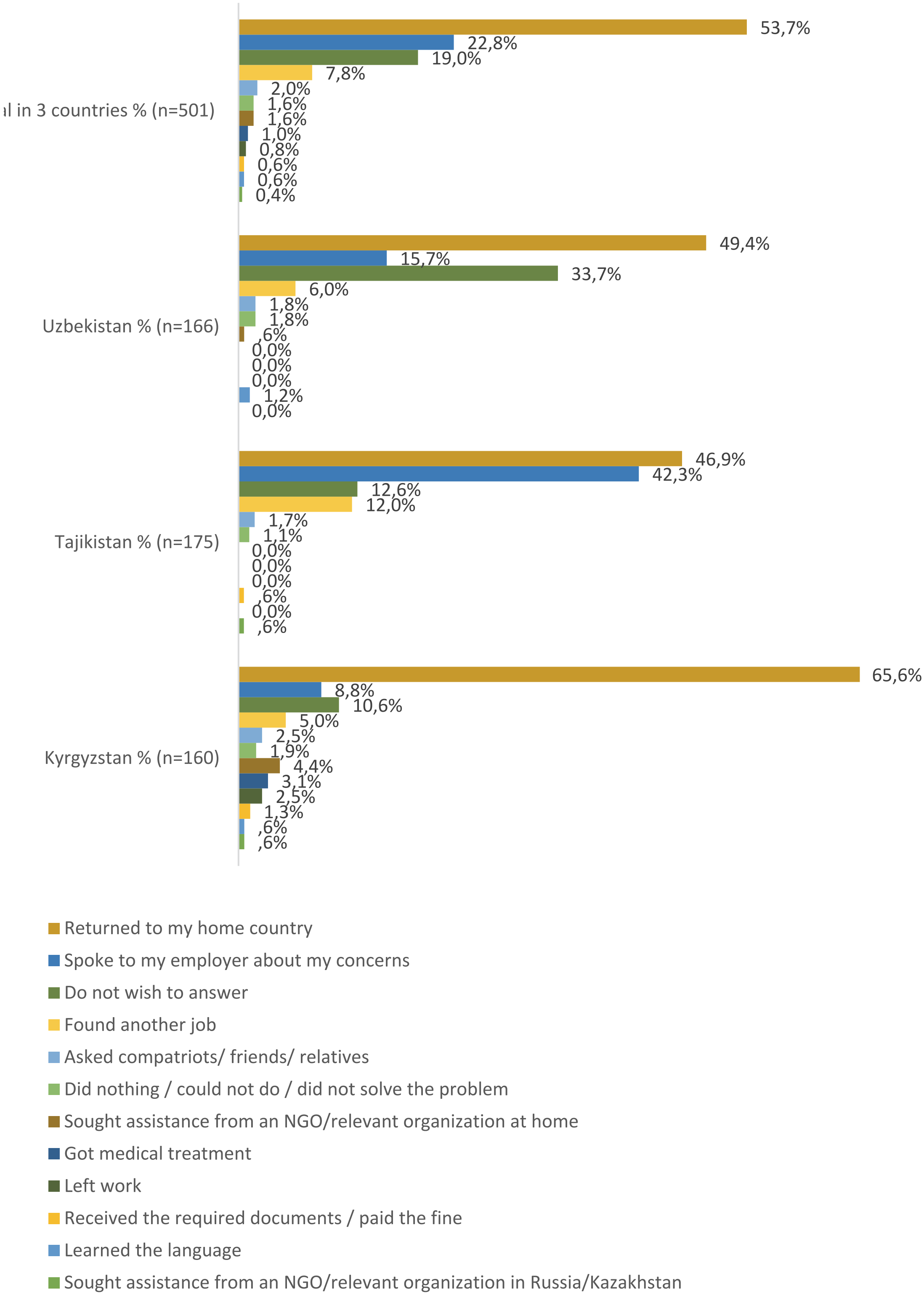


Table 5.11. What were some of the challenges that you faced while you were working in the Russian Federation/Kazakhstan?

	Kyrgyzstan % (n=195)	Tajikistan % (n=193)	Uzbekistan % (n=191)	Total in 3 countries % (n=579)
Working hours were often longer than indicated in the contract(s)	34,4%	20,7%	22,0%	25,7%
Language barrier	25,1%	23,3%	23,6%	24,0%
My health deteriorated due to work conditions	31,8%	15,5%	18,8%	22,1%
My salary was often lower than indicated in the contract(s)	19,5%	17,1%	14,1%	16,9%
I could not physically take care of my family back home	22,6%	9,3%	9,9%	14,0%
I experienced workplace discrimination (gender, race, age) and/or abuse	24,6%	7,8%	2,6%	11,7%
I did not know where I could receive support in case of abuse, violence or exploitation from the employer	15,9%	2,1%	3,1%	7,1%
I had a difficult time integrating to the local community	9,7%	5,7%	2,1%	5,9%
My skills did not match my work	5,1%	5,2%	4,2%	4,8%
The contract conditions did not match the working conditions upon arrival	7,2%	4,7%	1,6%	4,5%
The employer did not pay/ delay salary or pay an incomplete salary	3,6%	0,5%	0,0%	1,4%
Pandemic	1,5%	0,0%	0,5%	0,7%
With supervisory state authorities	0,5%	0,5%	0,0%	0,3%
Family problems	0,0%	1,0%	0,0%	0,3%
No challenges	22,1%	14,5%	15,7%	17,4%
Do not wish to answer	4,1%	6,2%	25,1%	11,7%

are partly covered by several studies of ADB in 2007[70], 2019[71], and 2020[72]. There is a limited market of private vocational training in Tajikistan. To date, it has been mostly the University of Central Asia (UCA) that provided paid courses that prospective migrants could consider. Upon completion, UCA provides certificates that differ from the certificate issued by the Ministry of Labour, Migration and Employment and Ministry of Education and Science. Thus, the majority of Tajiks, including prospective migrants and returnees often apply for public training courses provided by the old VET system. It should be noted that the public vocational training centres have a much stronger position to become useful for foreign recruitment agencies and employers, as there is more synergy and preparedness level there. For example, they have the advantage of attestation and certification by issuing certificates offered by the Ministry of Labour, Migration and Employment and the Ministry of Education and Science that are recognized in the Russian Federation, Kazakhstan and other CIS countries. There are a number of other advantages that the public vocational training centres have over the private vocational training centres. As a subsector, vocational training centres have a better basis for offering recruitment and job placement services to their graduates.

Uzbekistan

To understand the system of vocational training in Uzbekistan, it is necessary to take into account the education system in the country. In addition to general secondary and secondary specialized education, there is vocational education provided for young people following their graduation from basic secondary education. Based on the President's decree from 06.09.2019, vocational education institutions are mandated in providing educational programs based on International Standards, as well as lower qualified programs for obtaining specialty.

In Uzbekistan's vocational education training sector, the leading organization in offering professional trainings is "Ishga Marhamat", whose profile consists of employment promotion centre, financial literacy, migration and assistance departments.[73] It was created under the Ministry of Employment and Labour Relations by Presidential Decree of the Republic of Uzbekistan

[70] ADB 2007, *Jobs Diagnostic Tajikistan*, Asian Development Bank.

[71] ADB 2019. Skills and Employability Enhancement Project (SEEP), Republic of Tajikistan TA Draft Final Report, Manila, Asian Development Bank.

[72] ADB 2020, Strengthening Support for Labour Migration in Tajikistan: Assessment and Recommendations, Asian Development Bank.

[73] МОНОЦЕНТР (*monomarkaz.uz*) - Monocentre

Table 5.12. Legislation regulating recruitment and vocational training and the stakeholder government institutions

Kyrgyzstan	Tajikistan	Uzbekistan
List of legislation that regulates recruitment/vocational training in Kyrgyzstan: 1. Law on Primary Vocational Education; 2. Government Resolution on VET (http://cbd.minjust.gov.kg/act/view/ru-ru/55555555?cl=ru-ru);); 3. Law of the Kyrgyz Republic "On External Labour Migration" of January 13, 2006, No. 4 (with amendments and additions as of July 24, 2020) http://cbd.minjust.gov.kg/act/view/ru-ru / 1792? Cl = ru-ru;; 4. Part 9 of article 17 of the Law of the Kyrgyz Republic "On the licensing and permit system in the Kyrgyz Republic" dated October 19, 2013, No. 195 (with amendments and additions as of April 22, 2020) http://cbd.minjust.gov.kg/act/view/ru-ru/205058?cl=ru-ru; ; 5. Paragraphs 4, 23-24 of the Regulation on the procedure for the implementation of activities for the employment of citizens of the Kyrgyz Republic abroad, Appendix 2 (to the Resolution of the Government of the Kyrgyz Republic dated April 16, 2019, No. 175) (Amended by the Government of the Kyrgyz Republic on August 6, 2020, No. 412) http://cbd.minjust.gov.kg/act/view/ru-ru/13565?cl=ru-ru;; 6. Instruction of ICC on monitoring of PRAs http://migrant.kg/index.php?act=view_material&id=1278 7. Government Resolution from 6 August 2020, # 412 On amendments to the Resolution of the Government of the Kyrgyz Republic "On some issues in the field of labour migration in the Kyrgyz Republic" dated April 16, 2019, No. 175	List of legislation that regulates recruitment/vocational training in Tajikistan: 1. Law on Education of the Republic of Tajikistan from 22 July 2013; 2. Law on Adult Education of the Republic of Tajikistan from 24 February 2017; 3. Law on Preparing Specialist in Accordance with the Labour Market Needs from 29 January 2021 4. Law on Supporting Employment of the Republic of Tajikistan from 1 August 2003 5. Law on Introducing Changes to the Law on Supporting Employment in the Republic of Tajikistan from 17 May 2018.	List of legislation that regulates recruitment/vocational training in Uzbekistan: 1. Presidential Decree № ПП-4939 31.12.2020 "On measures for cardinal improvement of the qualifications assessment system and providing the labour market with qualified staff" 2. Decision of the Cabinet of Ministers № 466 07.08.2020 "Approval of normative-legal documents regulating the system of continuous primary, secondary and secondary specialized professional education in the Republic of Uzbekistan" 3. Presidential Decree № ПП-5094 28.04.2021 "On the state program for creating new jobs and promoting employment for the population for 2021" 4. Order of the Minister of Employment and Labour Relations № 1052 27.12.2018 On amendments and additions to the regulations on the procedure for allocation of subsidies and grants at the expense of the state employment fund of the Republic of Uzbekistan 5. Decision of the Cabinet of Ministers of the Republic of Uzbekistan № 183 5.04.2021 About additional measures to improve the professional training system of low-profitable and unemployed citizens and increase the efficiency of labour bodies 6. Law of the Republic of Uzbekistan № ЗРУ-632 13.08.2020 On introduction of changes and additions to the law of the Republic of Uzbekistan "On private recruitment agencies" 7. Presidential Decree № ПП-4804 11.08.2020 On additional measures aimed at attracting entrepreneurship, increasing employment and professional training of poor and unemployed citizens, as well as ensuring population employment 8. Law of the Republic of Uzbekistan № ЗРУ-501 16.10.2018 On private recruitment agencies 9. Intergovernmental agreement 21.12.2017 "On organized recruitment and attraction of the citizens of Uzbekistan for temporary employment in the territory of Russian Federation"

		10. Decision of the Cabinet of Ministers № №824 14.10.2017 On the approval of the provisions on the order of admission to training and the order of training in regional centres of professional training of the unemployed and unemployed population 11. On measures to create centres for professional training of unemployed citizens in the territories of the Republic of Uzbekistan
List of stakeholders that are involved in the policymaking and/or implementation regarding recruitment and vocational training: ● Department of External Migration of the Ministry of Foreign ● Affairs of the Kyrgyz Republic ● Information and Consultation Centre of the Department of External Migration of the Ministry of Foreign Affairs of the Kyrgyz Republic ● Agency on Primary VET ● Ministry of Health and Social Development of the Kyrgyz Republic ● Ministry of Education and Science of the Kyrgyz Republic ● Ministry of Justice of the Kyrgyz Republic ● Ministry of Economy and Finance of the Kyrgyz Republic ● Association of Private Recruitment Agencies of the Kyrgyz Republic ● Union of Private Recruitment Agencies of the Kyrgyz Republic	**List of stakeholders** that are involved in the policymaking and/or implementation regarding recruitment and vocational training: ● Ministry of Labour, Migration and Employment of RT, (its sub-structures are engaged in implementation of policies) ● Ministry of Education and Science of RT, (its sub-structures are engaged in implementation of policies) ● Ministry of Economic Development and Trade of RT, (its sub-structures are engaged in implementation of policies) ● Civil society organizations, (within on-going projects) ● University of Central Asia (implementer)	**List of stakeholders** that are involved in the policymaking and/or implementation regarding recruitment and vocational training: Ministry of Employment and Labour Relations of Republic of Uzbekistan Ministry for the Support of Mahalla and Family of Republic of Uzbekistan (and the Department for the Protection of Rights and Support of Citizens of Uzbekistan Working Abroad) Agency for External Labour Migration of Republic of Uzbekistan National Centre of the Republic of Uzbekistan for Human Rights of Republic of Uzbekistan
Official online reference points: https://www.migrant.kg/ru/about/normativno-pravovaya-baza/ https://www.migrant.kg/ru/services/black-list/ https://www.migrant.kg/ru/about/istoriya/ https://www.migrant.kg/ru/services/employment-agency/?page=5&country_id=1		**Official online reference points:** https://mehnat.uz/ru/documents/ukazy-i-postanovleniya-prezidenta-respubliki-uzbekistan https://mehnat.uz/ru https://mehnat.uz/ru/services/reestr-chastnyh-agentstv-zanyatosti (government register of PRAs) register of PRAs)

Table 5.13. Vocational education training for specific sectors, compared across three countries in Central Asia

Kyrgyzstan	Tajikistan	Uzbekistan
The State Vocational Training Centres (SVTCs) in Kyrgyzstan have a long history of supporting low-income individuals and their families by providing professional and technical skills trainings and helping students to find on-the-job training or paid job. SVTCs prepare workers for such vocations as follows: • construction, utilities (electricity, gas), building repair works (builder/constructor, electric and gas welders, electricians, plasterer-painter, drywall workers); • construction, finishers, carpenters, furniture makers; • railroad transportation (diesel locomotive driver, ways tracker, passenger carriage conductor); • car mechanics (which produces about 8-9 professions, and about 24-25 short-term courses); • light industry, garment production industry (seamstress, taylor, fitter-repairman of sewing equipment, cutters of sewing products). • food and drink services (cooking chef of national and foreign cuisine, pastry chef); • tourism (i.e, cooks, waiters, bartenders, maids, receptionists); The most popular long-term programmes in SVTCs are the following: "Diesel locomotive driver", "Cook, pastry maker". The least popular vocation is dry-building worker. Among the short-term courses the most popular is the "Ways tracker". During 2021 one of the SVTCs received a license for providing a 3-month training course to graduate "Passenger carriage conductors" – for which enrolment was ongoing during FGD. Most popular professions as seamstress and all the garment industry worker vocations are popular. Three big sector vectors include: 1) the light industry as in the garment sewing workers, 2) tourism (cooks, waiters, bartenders, maids, receptionists), 3) there is a large interest for car mechanic repair sector, which includes about 8-9 professions, and 24-25 short-term courses. In the Kyrgyz private vocational training sector there are high-flyer leaders that are training professionals in ICT sphere, and they have a strategic vision to train 50,000 coders by 2030, which on average is 2500 annually on average (website source). Another, market leader, during the last 15 years has trained 150000 graduates in a variety of professions as of 2021, which means around 2500-3000 annually on average, and this will only grow (website source).	• The top five most popular professions among Tajik students include such specializations as a welder, electrician, plumber, seamstress, and pastry chef. • 90 per cent of women-students choose the profession of seamstress or pastry chef, students choose areas that are in demand both in Tajikistan and abroad. • Men are mostly interested in gaining computer skills, as well as learning the basics of accounting in 1C software application. • In the domestic market, the demand among the educational services of vocational training centres demonstrates an interest in obtaining the skills of a seamstress, pastry chef, cook, as well as the skills of children's and adult massage. Since most of the students are women, it should be noted that in addition they tend to study English and Russian languages. Courses planned and most popular are as follows: • There is demand among students for training in professions in the field of economics, at the moment, only a course in accounting is available. It is likely that a student who completes a course in accounting, can work in a wide variety of fields, from education and health care to activities that require accounting and reporting. • Business planning in agribusiness, programming, accounting, and English language skills are by far the most competitive and sought after study focuses.	• In January 2021 the Decree of the President of Uzbekistan was signed. Each region creating a centre for vocational training, in accordance with the Decree N14, should prioritize the professions in the field of construction: concrete worker, welder were to be taught. • The centre has eight areas of technical professions, among them are installers and electricians. All of them are trained to work in the Russian Federation. Out of 36 trainees, 20 are already employed in the Russian Federation (FGDRUZ3_1 (M/50-60/ Director Professional Training Centre). • Besides technical professions, the students learn Russian language, mainly technical terminology, so that they have no difficulties in the process of work. It was mentioned that a specialist from RUDN University was invited to teach the students Russian language for 12 days. In 2021 the centre also has plans to invite a specialist to teach their students. • The centres sign agreements with organizations and enterprises, namely agricultural, livestock orientation, in order to provide their students with practical consolidation of the theoretical knowledge, which often results in students being employed by the same enterprises (as veterinarians, zoo technicians). "We work directly with the existing cattle breeding, livestock farms in Sherabad. To be more precise, for the first month or two weeks we are in direct contact with representatives of these farms. They help our students gain practical skills in veterinary medicine and animal care. And it turns out that our students learn a profession through practice...Thus, many of our students are already engaged by these farms as veterinarians, zoo technicians." FGDRUZ3_1 (M/50-60/ Director Professional Training Centre).

Kyrgyzstan	Tajikistan	Uzbekistan
Graduates of the PVTCs work in private sector in Kyrgyzstan, some find jobs in the Russian Federation, Republic of Korea, Czechia, and Lithuania. Through PVTCs participation in the vacancy fairs 30-40 per cent the graduates find jobs in the Russian Federation and Kazakhstan according to their specialisations received in the PVTCs. Some of the PVTCs have strong partnerships with private sector, such as construction companies in Novosibirsk and Saint Petersburg. There are strong cooperation projects with the Kyrgyz government partners such as the Department of Social Protection of Workers in Districts and Oblasts, Migration Service, and donors such as the UNDP and UNICEF. The most popular single course is «Travel Agent», it is in demand among those who wish to work both in Kyrgyzstan and in the Russian Federation. There are popular courses in culinary skills (cooking), including European cuisine. It is planned: -to add the most popular courses, such as cooking, cutting and sewing, hairdressing, design courses, and mental arithmetic method for children; garment making skills, pastry making, computer design training; - to increase number of employees in organization. The goals for future activities are: opening of a vocational and technical college based on production workshops, expansion of the base and renewal of licenses.		

Table 5.14. Country/Sectors in which recruitment specialisations are forming, compared across countries in Central Asia

Kyrgyzstan	Tajikistan	Uzbekistan
• Sectors in the Russian Fedeartion such as agriculture, factory production (manufacturing plants popular among job seekers aged 29-55); construction, services; product disassembly, packaging, picking, collection on request, and equipment assembly, as well as mechanical engineering, services (hotels, service). When it comes to regions in the Russian Federation, the Kyrgyz migrants often migrate to: ○ Moscow and Leningrad regions, Tatarstan (all kinds of work); ○ Siberia for the shift work in construction and factories (these are popular among job seekers aged 25-55; ○ Tambov region, Ekaterinburg, Samara, Yaroslavl, Lipezk, Saint-Petersburg for a variety of sectors, including home appliance factory, chicken factory, warehouse (popular among job seekers aged 18-30), and construction sector; • Republic of Korea's factory production sector; • Turkey's tourism, hotel and hospitality businesses (they require mostly staff between the ages of 19 and 40); • UAE's tourism, hotel and hospitality businesses; • European and Persian Gulf countries' medical services and healthcare (doctors and nurses) – most recently this geographic sector is becoming the favoured job destination. The wage mentioned (FGDKR1) is a ballpark of 4000 USD paid to qualified medical doctors, and just slightly less to qualified medical nurses (this is perhaps related to the COVID-19 emergencies across countries). • Qatar, Lithuania - already popular destinations; • Canada and Japan - new destination being explored, prepared, negotiated with key stakeholders.	• Tajik migrants going to the Russian Federation are mostly employed in the construction sector (90 per cent of migrants, mostly male); • Housing and utility sector, trade, and on a much smaller scale in agriculture; • Fewer Tajik women migrate for labour, and those who do are mostly employed in such sectors as greenhouses, catering, trade, and there is also the medical field, but much less. • Textile industry, agriculture, field farming, as well as construction, and there are no restrictions on gender here, both women and men can work. • Technical personnel in the service sector are in demand in Europe, for example, argon welders are very much in demand, *"We tried to recruit such people, but the employer asked for 20 welders, and it turns out that there are only three of them in Tajikistan."(FGDRT).* • Often for popular sectors, applicants do not meet the requirements (skills and experience do not match the jobs). *"For example, there is a great demand in the engineering sector in Germany, Czechia, and Slovakia. For example, Peugeot Citroën Group, and other such candidates, but our citizens simply do not fit the requirements. As a result, other sectors are popular, but most often we send workers to the construction and services sectors."*	• The private recruitment agency participant of the FGD sends its clients mainly to the countries of Eastern Europe, Central Eastern Europe, the European Union, as well as the Russian Federation. • Apart from the Russian Federation, there are such destinations as Slovakia, Poland, Lithuania, Latvia; • The most popular sectors are construction and meat cutting in Poland and Lithuania.

No ПП-3913.[74]. Based on president's decree on the implementation of safe, orderly and legal migration, "Ishga Marhamat" was ordered to cooperate with a number of foreign agencies to open specialized training centres for training prospective migrants in various sectors.

Connections between vocational training centres and state or private recruitment agencies

Although it would seem desirable to have a mutually co-dependent system where SRAs and PRAs work together with vocational training centres as parts of the same system of preparing a job seeker with capacity for earning a wage and matching his or her skills to job opportunities (as two branches of the labour market's supply side) this is often not the case within the Central Asia context. Some public vocational training centres mentioned that they work with their own preferred/selected recruitment agency to find job placements, internships, or to send their graduates to fill a vacancy. The associations of private recruitment agencies in Kyrgyzstan mentioned that they cooperate with private vocational training centres, however very little was noted about cooperating with the public vocational training centres. With the SRA

[74] ПП-3913-сон 20.08.2018. О мерах по совершенствованию структуры органов по труду и укреплению системы защиты трудовых прав и охраны труда граждан (*lex.uz*)

in Kyrgyzstan being a division of the Ministry of Foreign Affairs, and the state/public vocational schools being under the jurisdiction of the Agency for professional training under the Ministry of Science and Education, there is very little synergy between the two branches; systems and opportunities for greater cooperation will be required in order to better synergize skills development with labour migration policy and opportunities. This issue is resolved well in Uzbekistan, as requirements for professional training and skills preparedness of labour migrants from Uzbekistan had been inscribed in the inter-governmental agreement on labour migration between the Russian Federation and Uzbekistan in 2018; thus there is a strong cooperation between state/public VET and SRAs in Uzbekistan, something that no doubt adds value to the process and indicates why a larger portion of Uzbek migrants seek employment through SRAs than in the other two countries.

When it comes to Tajikistan, professional skills training is not prioritized at the governmental level as much as in Uzbekistan, however, there has been a push made in the direction of adult education and diversification of skills through private vocational training centres for a spectrum of services and specializations to match the emerging market and societal needs. The participants of FGDs noted that there are specifics of adult education and the need to introduce special techniques for adult education (andragogic approaches were highlighted). Andragogic methods in Tajikistan (with EU technical assistance project for the development of a validation system for vocational education) has already been adopted, there is a special license to enhance the qualifications of higher schools, which are already conducting training under this license. In addition, it was noted that the adopted law of Tajikistan "On Education" includes a clause on andragogic methods. The very notion of "Adult Learning and Education" and the Law "On Adult Education of the Republic of Tajikistan" were recognized. This law was one of the first to be adopted in the former Soviet Union. The law was aimed at solving the issues of validation, certification, and recognition of skills of labour migrants" (FGDRT).

Recruitment services to the Russian Federation and other countries: sectors and occupations

There is a gap between what the recruitment agencies as service providers are capable of providing to jobseekers, particularly as it relates to employment in the Russian Federation and the expectations of jobseekers as it relates to salaries, working conditions, and career development. SRAs and PRAs must take into account the needs, expectations and offers of employers (many of whom are looking to fill positions in heavy manual labour requiring limited skills and lower wages) as well as comply with a variety of national and regional regulations. As such, the participants of FGDs noted that, for many clients seeking services of SRA/PRAs – who tend to be more educated – other countries may offer better packages including more high-skill and career growth job opportunities alongside better pay and social security provisions. This includes countries in the EU, such as Poland, Lithuania, Czechia, as well as Turkey, and the Gulf Cooperation Council (GCC) countries that have concluded organized labour recruitment agreements with the ICC of t Kyrgyzstan as well as other countries in Central Asia.[75] In terms of labour migration destinations other than the Russian Federation and Kazakhstan – there are many and this is mostly a niche for the private recruitment agencies and public vocational training schools that have agreements with specific employers in Germany, Poland, Republic of Korea, and so on as mentioned above. There seem to be growing specializations by sector(s) across different countries of origin and destination.

Gender distinctions are also often apparent in regards to access to job opportunities, thus women are not preferred as job seekers by a number of the agencies that participated in the FGDs. Participants referred to restrictions for certain types of work/jobs based on gender both by employers and from perspective of watchdogs in migration services (in Tajikistan and Uzbekistan). Certain age restrictions also apply, (job opportunities are more available for younger men but rarely men older than 45 years of age (90 per cent of employers require workers not older than 45 years of age). Work experience is welcome, but it is more important for the documentation presentation at embassies and consulate requirements on the work experience confirmation before visa issue rather than a rule set by employers themselves.

Key challenges that state and private recruitment agencies face in regards to labour migration to the Russian Federation

The ICC in Kyrgyzstan has the power and resources to be the biggest provider of recruitment services for foreign companies and municipalities. It has the most critical infrastructure for monitoring and evaluating the labour market trends and the government policy pertinent to the Kyrgyz labour migrants abroad, the public and private institutions involved in the recruitment and training, and a more general view of the knowledge, skills, and competences being formed in Kyrgyzstan that can be monetized internally and externally. ICC's average annual service volume amounted to 17 700 citizens that were provided with jobs (ICC data on recruitment for 2019). The ICC does not rule out the possibility of outsourcing completely the foreign recruitment business to private recruitment agencies.

[75] List of countries with which the Kyrgyz Republic's Department of External Migration has agreements or intentions (preparatory/negotiation stage) for organized labour recruitment: Russian Federation, South Korea, Turkey, UAE, Poland, Qatar, Saudi Arabia, Oman, Latvia, Lithuania, Germany, Czechia, Slovak Republic, Bulgaria, Kuwait, Bahrain, Japan (listed on URL: *http://www.migrant.kg*)

There are three key challenges to the process that have been identified by employers within the FGDs:

(1) Developing Relations with SRA/PRAs

- Recruitment agencies attempt to keep track of their employer clients by creating archives of contracts/agreements, and databases of employers with information tracking about the quality of job placements and job experience of their migrant clients with specified employers but this client need tracking and client growth is limited;
- State/public vocational training centres have had long-term partnerships with employers that request specific skills preparation from them; in-depth studies of those relationships represent cases of success stories or how problems/challenges in cooperation were overcome. However, again there are limited efforts to link VTCs with new employers;
- Serious and large enterprises are often more interested in long-term cooperation with the skills providers (vocational training centres) rather than with the agencies, but the changing needs and requirements of the employers are not sufficiently well understood by the recruiter in order to improve its service quality and create more opportunities.

(2) Coordinating the recruitment process:

- Staff capacity at SRA is limited. There are 11 employees working at the ICC as state employees. Resolution № 854 from 11 December 2015 on Issues of the State Migration Service under the Government of the Kyrgyz Republic provides extended powers to the ICC within the State Migration Service. As this research demonstrates, as of today the ICC has the strongest position when it comes to organizing labour recruitment of the surplus Kyrgyz workers for the firms and municipalities abroad. While serving 17000 job seekers annually, the ICC does not have the appropriate staffing or expertise in order to carry out services to the expectations of all interested employers and prospective migrants. In recent years, ICC has considered outsourcing organized recruitment services to PRAs and shifting its focus to policy making, implementation, and monitoring, in order to create the right ecosystem for the recruitment industry to develop.
- Personnel capacity at PRAs. The availability and level/quality of personnel support and preparedness varies significantly, and PRAs often do not pay close enough attention to the training of the staff in order to understand and follow regulations and procedures as well as to provide sufficient client services to employers and prospective migrants.

(3) Outreach and identification of qualified/interested candidates:

- As for the material and technical provision of state employment centres, it is not customary to talk about it, but there is a shortage of office equipment in regional public recruitment agencies/branches in all countries. Proper physical infrastructure is required in order to provide effective outreach to both employers and prospective migrant workers in the country of origin. Without this infrastructure, the outreach and identification of candidates is limited. Most of the PRAs have internal databases /lists/ contract lists and repositories focused on migrant workers/ job seekers and separately on employers. In some PRAs, the database on migrants and employers does not exist.

Within the liberalized market setting, which in Central Asia is represented mostly by Kyrgyzstan's recruitment industry, there is a growing variety of private recruitment agencies and private vocational training centres. The recruitment agencies have formed associations that serve as unionized interest discussion, policy development, and rights lobbying on behalf of the small and medium sized recruitment agencies. The private vocational training centres are also part of this group focusing either on high—margin market niches (specific skills supply in travel bookings, or new skills in ICT coding/ management/investment startups) or on long-term low-margin stable skills (languages, personnel training, cooking and confectionary, sewing and clothing). While the state-funded vocational training centres have been specializing in their long-term specialist fields in building and construction skills, transportation (road, rail, aviation, and logistics), light industry manufacturing (including large scale textiles production, clothing manufacturing).

In Uzbekistan, the legislation on labour migration has recently been amended towards liberalization of labour recruitment with the aim of improving the safety of the Uzbek migrants, thus supporting organized recruitment. There was an immediate setback with too many companies offering inadequate services under false pretenses of hiring workers for the foreign markets and/or companies including many based in the Russian Federation. The

Uzbek government withdrew all licenses from private recruitment agencies except for three companies that are currently operating in Uzbekistan. Most of the labour migrants are serviced by the regional AELMs and a small selection of private recruitment agencies despite more than 50 registered private recruitment agencies listed on the official online website[76]. However, the system of the public (governmental) professional and training centres to support external labour migration has been strengthened with a systematic support to the governments' professional and technical education colleges and technical schools spread across the numerous municipalities in the high-volume labour emigration areas, as well as in the regions with high labour surplus (Surhandarja and Kaskadarja oblasts).

With strong government regulators, implementers, controlling institutions, as well as state-led business and social subsidy support, there is a strong supply of public vocational training schools where studies can be subsidized (students can get stipends or loans, as well as accommodation to take long-term and short-term courses). As a result, there are hardly any private sector actors who are interested to compete with this well-established state funded system (none was discovered during field work for this study). For example, the ADB's loan of USD 93 million was allocated for a nation-wide project titled Development of Skills for Modern Economy of Uzbekistan in December 2020 with the aim of strengthening of the interrelations between the labour market and the system of professional education, improving the quality of professional education of unemployed and the youth, and upgrading of the management system of professional education and employment support.

In the labour policy of Tajikistan there is a preference to serve the internal market rather than to develop training or recruitment services for external markets, and this conclusion comes from the observation of the state recruitment positioning compared to market players. For example, there are benefits associated with obtaining employment through the Centre for Consulting and Preparing Labour Migrants. Employers make a specific request, which describes all the requirements for employees, and the centre, in turn, recruits and sends trained personnel with the necessary skills. Citizens of Tajikistan apply to the centreeand the centre adds them to the list of applicants and, if there are no applicants already listed to match the employer's application, the centre advertises for additional applications from wider job seekers.

Such employment departments as Dushanbe Labour and Recruitment Agency (there are such state employment agencies in every district across the country are mostly engaged with internal employment placements, that is, on the territory of Tajikistan. It is a tight system of domestic employment market where trust in the state agencies and official employment translates into loyalty of the local employers' organizations (the salaries are paid in a timely manner while additional benefits such as Russian language skills are provided through free courses). The main areas of employment internally in Tajikistan include the following: food industry (Coca-Cola factory); construction, road repairs, mining, transportation industry; trolleybus and taxi driving; gardening; medical field, hospitals and polyclinics (mostly for citizens who have higher and secondary medical education degrees).

The existing regulatory aims and means have been well documented in the legislation regulating recruitment and vocational training and the stakeholder government institutions. The field research findings provide detailed information about the existing skills mismatch and the aspirations of the migrants towards specific sectors and countries/regions. These need to be addressed with the view of streamlining the recruitment process along with skills training for increasing effectiveness of skills development and matching with the existing and newly created jobs and employers.

Understanding skills mismatch & experience of returnees

In the previous work experience in the Russian Federation and Kazakhstan, skills mismatches have been reported. While migrants found jobs mostly in such sectors as construction, hospitality and tourism industry, public administration and support (cleaning, gardening, washing, beauty care, cashier services), as well as in manufacturing and food processing, these occupations often did not correspond to migrants' training or work experience. More than one-third of returnees had no work experience in these sectors (36%). In the Kyrgyz sample, almost half (48%) had no work experience in their occupations; in the Tajik and Uzbek samples, about 30 per cent had no work experience in their occupations. 11 per cent of the total sample had less than one year of work experience in these sectors, while 22 per cent had 1-2 years of work experience.

There is a significant difference between the Uzbek sample and others when it comes to whether education and skills were useful in further job searches. For 61 per cent of returnees in the Uzbek sample, the education, certificates, and skills acquired in the previous job were considered useful, while in the Kyrgyz and Tajik sample, the mismatch between education and job search was most striking, with 66 per cent of the Kyrgyz returnees and 63 per cent of Tajik returnees stating that education, certificates and work experience were not useful for job search.

This can be partly interpreted based on the results of the FGDs as follows: the jobs available in the Russian

[76] URL: *https://mehnat.uz/ru/services/reestr-chastnyh-agentstv-zanyatosti* (government register of PRAs)

Federation and Kazakhstan often require low-skill labour, thus no skills need to be confirmed. However, literature review and field research have indicated that the Uzbek state has invested more heavily in the development of VET centres, and this may be reflected as well in the improved matching of workers with occupations meeting their skill sets abroad.

Figure 5.18. Have you worked in the sector before? If yes, for how long?

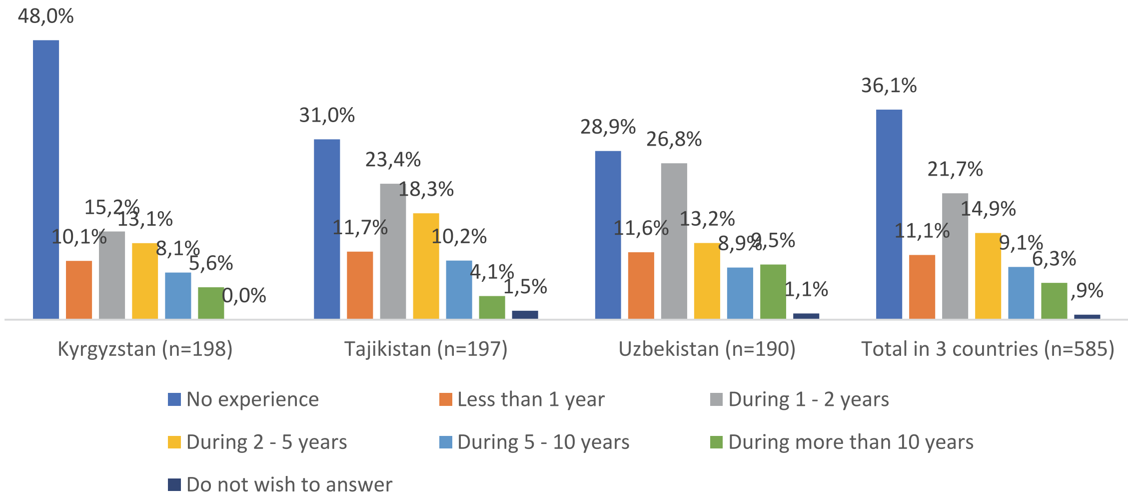
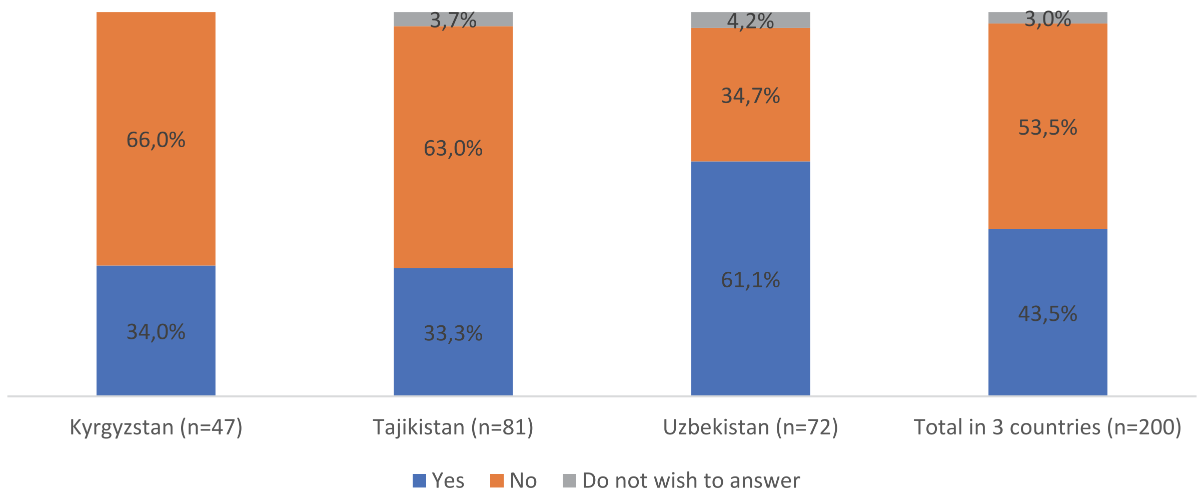


Table 5.15. Sectors in which returnee migrants found latest employment (in the Russian Federation and Kazakhstan)

	Kyrgyzstan (n=197)	Tajikistan (n=195)	Uzbekistan (n=190)	Total in 3 countries (n=582)
Construction	29,4%	49,2%	34,2%	37,6%
Wholesale and retail trade (bazaar)	7,1%	13,8%	6,3%	9,1%
Hotels/ Accommodation & Restaurants	10,7%	7,2%	6,8%	8,2%
Manufacturing/other factory work	7,1%	5,1%	10,5%	7,6%
Food processing	9,1%	3,1%	8,9%	7,0%
Domestic work	2,0%	4,6%	13,7%	6,7%
Public administrative and support services, including cleaning, landscape care, and other	10,2%	3,1%	3,2%	5,5%
Other service activities, including washing / dry-cleaning of clothes, hairdressing and other beauty treatment (massage parlor) / cashier	9,1%	4,1%	1,6%	5,0%
Transportation (marshrutka minibus/taxi/bus/motor bike	6,1%	2,6%	5,8%	4,8%
Agriculture/ forestry	6,1%	3,1%	2,6%	4,0%
Repair of motor vehicles & motorcycles	1,0%	1,5%	2,1%	1,5%
Human health and social work activities	1,5%	1,5%	1,1%	1,4%
Fishing	0,5%	0,0%	1,1%	0,5%
Arts, entertainment (including performances) and recreation	0,0%	0,5%	0,5%	0,3%
Mining and quarrying	0,0%	0,0%	0,5%	0,2%
Education	0,0%	0,0%	0,5%	0,2%
Do not wish to answer	0,0%	0,5%	0,5%	0,3%

Figure 5.19. Was your education (including official certificates) and skills from prior work experience helpful in finding your employment?



VI. CONCLUSIONS AND RECOMMENDATIONS

i. General recommendations

Recommendations on interstate regulations of migration between countries of origin and destination in the Russian Federation and Central Asia

- Contribute to the signing and enhancement of the implementation of new agreements on organized recruitment between countries of origin and destination. Integrate feedback from employers, recruitment agencies and migrant workers to enhance systems and processes to respond to the needs and expectations of stakeholders and make the process more competitive in comparison to informal recruitment mechanisms (Governments, Ministries of Foreign Affairs, Ministries of Labour of Central Asian countries and the Russian Federation, IOM, ILO).
- Contribute to development of a coordination mechanism among key stakeholders involved in organized recruitment in countries of origin and destination to facilitate on-going cooperation, troubleshooting and problem solving within the recruitment processes (Governments, SRAs and PRAs, IOM, employers, migrant workers)
- Contribute to development of communications strategy among key stakeholders involved in organized recruitment in countries of origin and destination in order to improve awareness of services and their advantages for employers and workers (Governments, employers, SRAs and PRAs, migrant workers)
- Contribute to development of general tenets of methodology for assessing labour market needs in countries of destination and how these translate into labour migration policy and programming, particularly as this pertains to migrant workers from Central Asia (IOM, ILO).
- Contribute to development and acceptance of the general guiding principles on ethical organized recruitment of migrant workers in the Central Asian-Russian Federation corridor among key stakeholders (IOM, ILO).
- Contribute to development of uniform qualification requirements for migrant workers which will be recognized by the states participating in organized recruitment scheme so that participating employers understand the certifications and their equivalencies within national qualifications systems (Governments, Ministries of Internal Affairs of Central Asian countries and the Russian Federation, Ministries of Labour of Central Asian countries and the Russian Federation, Chambers of Commerce and Industry, WorldSkills Russia, IOM).
- Contribute to development and carrying out training and upskilling programmes for prospective migrant workers in Central Asia involving employers to meet the labour market needs in the countries of destination (Governments, SRAs and PRAs, vocational education and training centres in the countries of origin, employers, IOM).
- In the countries of Central Asia, contribute to creation of opportunities and organization of testing and certification of migrant workers for compliance with the declared professional and qualification requirements (Governments, SRAs and PRAs, vocational education and training centres in the countries of origin, employers, IOM).
- Contribute to setting up the comprehensive sustainable pre-departure information and orientation programme for prospective migrant workers in Central Asian countries (Governments, SRAs, PRAs, NGOs, IOM).
- Support development of a system for monitoring each stage of the organized recruitment process to enhance its efficiency and proactively identify concerns relating to, inter alia, skills matching, protection of migrants' rights, or efficiency (IOM).

Recommendations for improving social protection services for migrant workers from Central Asia in countries of destination

- Support and develop further cooperation with trade unions in various industries that assist migrant workers to resolve everyday problems (Governments of Central Asian countries and the Russian Federation, ILO, IOM).
- Encourage employers to include the provisions on ethical recruitment and securing the rights of workers into the corporate social policies (employers, municipal and regional authorities receiving migrants, IOM, ILO).
- Encourage employers to establish better complaints mechanisms so that workers can easily and effectively raise issues that need to be addressed in the workplace (IOM).

Recommendations for improving communication and coordination mechanisms in Central Asia and the Russian Federation

- Contribute to improve regular data sharing to streamline labour migration governance in the countries of Central Asia and the Russian Federation including non-personalized information on the issued visas (Turkmenistan), number of border crossings, registration at the place of stay, number of work permits and patents, place of employment and socio-demographic profiles of migrants based on open sources available (the Interstate Statistical Committee of the Commonwealth of Independent States (CIS STAT), national statistics services, Ministries of Internal Affairs, Ministries of Foreign Affairs, Ministries of Labour, Border Guard Services of Central Asian countries and the Russian Federation, United Nations Population Department, IOM, ILO, UNFPA).

- Promote openness and availability of statistical data on migration on the electronic resources of statistical agencies in Central Asian countries and the Russian Federation with data breakdown by key countries, regions, industries, socio-demographic characteristics of migrants (CIS STAT, national statistics services, Ministry of Internal Affairs, Ministry of Foreign Affairs, Ministry of Labour, Border Guard Services of Central Asian countries and the Russian Federation, United Nations Population Department, IOM, ILO, UNFPA).

ii. Country-specific recommendations – the Russian Federation

- Set up an institutional framework to manage and facilitate organized labour recruitment from Central Asia.
- Define a single Russian organized recruitment operator – a government body that will ensure: "promotion" of organized recruitment; coordination of the participants' activities; centralized interaction with foreign operators; maintenance of a unified monitoring and control system for determining employers' needs to actual employment.
- Incorporate into the Agreement on Organized Recruitment, the step-by-step procedures for recruitment of migrant workers employed through organized recruitment scheme on the 'Work in Russia' Portal (similar to the Operational Guidelines for Recruiting Migrant Workers to Work in the Russian Federation) with subsequent monitoring and control of administrative procedures by a single Russian organized recruitment operator.
- Introduce into the Russian legislation the institution of licensing Russian commercial companies engaged in recruitment of foreign labour for the Russian economy. These companies will perform all administrative procedures related to recruitment of migrant workers under an organized recruitment scheme on the basis of the "Work in Russia" portal. This measure will enable ethical market participants to work legally, including through an organized recruitment scheme, ensure compliance with all procedures of the scheme, obtain the exclusive right of "accreditation" with foreign public organized recruitment operators, and, at the same time, avoid unhealthy competition on the part of the entities using illegal or "grey" schemes. Due to administrative and criminal liability provided for by the Russian law, illegal market participants will be subject to serious legal implications. A requirement will be established whereby licensees shall ensure that all migrant worker's recruitment procedures are maintained in the unified state information system, the functions of which can be performed by the "Work in Russia" portal.
- Appoint a coordinator for organized recruitment from the Russian business side – the Chamber of Commerce and Industry of the Russian Federation, for example. The coordinator shall: support the participants during work with the partners; monitor processes and review their improvement proposals; develop and implement tools to settle conflicts of interest; prepare recommendations on the functioning of pre-entry and training platforms in the countries of Central Asia.
- Support existing initiatives and relevant stakeholders and institutions to build up the infrastructure to facilitate organized recruitment.

Set up an institutional framework for skills development and skills certification

- Incorporate into agreements on organized recruitment, provisions on the possibility of independent certification of migrant workers in Uzbekistan and the Russian Federation with issuance of relevant certification documents (an independent assessment of the level of professional competences using the WorldSkills Russia methodology with issuance of a SkillsPassport). Upon successful piloting, consider expanding to other countries in Central Asia.

Adapt the current organized labour recruitment to the needs of both migrants and employers and ensure strategic promotion thereof

- Develop public-private partnerships to simplify and expedite issuing of the permits necessary for employment in the Russian Federation, including improving digitalization of services.
- Develop a clear and understandable system of preferences for the parties to the organized recruitment, including economic incentive mechanisms encouraging migrant workers to enter into long-term labour relations with the employers, and for employers to participate in the organized recruitment scheme.
- Develop and implement a system of supporting measures, including information and advisory, methodological, legal, organizational and other

support for all parties of organized recruitment, with a special focus on SMEs.

- Create a workforce register covering migrant workers engaged in key industries (construction, agriculture, housing and utilities) on the basis of professional associations of employers. The creation of such a register would simplify taxation of migrants, provide them with guarantees of timely payment of salaries and ensure the necessary level of occupational safety, and also make it easier for employers to find labour resources.

iii. Country-specific recommendations – Kazakhstan

Recommendations on Legislation

- Bring the concept of organized recruitment to the domestic labour market of Kazakhstan. At the moment, organized recruitment is understood as a mechanism for sending citizens of Kazakhstan to work abroad. It has not yet been institutionalized as a mechanism for recruiting migrant workers to the labour market of Kazakhstan (Ministry of Labour and Social Protection of the Population of the Republic of Kazakhstan). The draft Migration Policy of the Republic of Kazakhstan for 2022-2026 should provide for the establishment of a scheme of organized recruitment of migrant workers for the labour market of Kazakhstan to work, inter alia, in housing and utilities, hotel and restaurant businesses.
- In order to develop regional labour markets in Central Asian countries it is important to create conditions for operation of private or public agencies promoting employment of migrant workers. Usually, employers do not seek services from such agencies.
- Issuance of entry documents from 01 November 2020, the responsibility to accept applications and issue permits to migrant workers was transferred to Public Service Centres. The list of requirements specifies the need to provide a contract with the employer. Currently, this requirement makes it more difficult for migrant workers to obtain permits. It is necessary to introduce an additional stage preceding the submission of documents to Public Service Centres – selection and recruitment through private recruitment agencies and employment centres.

Other recommendations

- Incorporate activities of private recruitment agencies into the organized recruitment scheme and define ethical standards for service provision.
- Raise awareness of employers on the activities of private or public employment promotion agencies, dealing with recruitment of migrant workers, (Ministry of Economy, Ministry of Labour and Social Protection of the Population, Ministry of Finance).
- Implement the instructions of the Address of the President of the Republic of Kazakhstan by enhancing digitalization, creating a digital platform and applications for organized recruitment of migrant workers with integration into the database of government authorities to ensure transparency of labour migrants' recruitment, control of social and working conditions, employer's tax payments (The National Chamber of Entrepreneurs of the Republic of Kazakhstan (Atameken), Ministry of Labour and Social Protection of the Population, Ministry of Digital Development, Innovations and Aerospace Industry of the Republic of Kazakhstan).
- Within the framework of interstate agreements on migrant workers with Uzbekistan and Tajikistan, develop implementation mechanisms taking into account the new economic conditions, social restrictions and current epidemiological situation.[77] (The Ministry of Foreign Affairs, the Ministry of Labour and Social Protection of the Population).

iv. Country-specific recommendations – Kyrgyzstan

- Improve collaboration between state entities and PRAs for the protection of migrant workers. There have been cases when PRAs were unable to exert any influence in helping their labour migrant clients to resolve any disagreements/problems with their employment in the Russian Federation and Kazakhstan. In order to secure labour migrants rights, state regulators may treat the PRAs as business entities pressuring them to bear the responsibility and the costs of such situations.
- Good quality "meaningful digital connectivity" is needed as was suggested in the WB study and digital skills literacy/proficiency would contribute greatly to all participants of the process of organized recruitment.
- Enhance the capacity of PRAs to deliver quality services and monitor their business through the establishment of client databases.
- It is necessary to enhance the work relationships between the PRA and the Embassy of the Kyrgyz Republic to protect the rights of migrant workers.

[77] On the Ratification of the Agreement between the Government of the Republic of Kazakhstan and the Government of the Republic of Uzbekistan on the Employment and Protection of the Rights of Migrant Workers, Nationals of the Republic of Uzbekistan, in the Republic of Kazakhstan and of Migrant Workers, Nationals of the Republic of Kazakhstan, in the Republic of Uzbekistan / Law of the Republic of Kazakhstan No.314-VI 3PK dated 17 April 2020 // *https://adilet.zan.kz/rus/docs/Z2000000314* ; On Execution of the Agreement between the Government of the Republic of Kazakhstan and the Government of the Republic of Tajikistan on the Employment and Protection of the Rights of the Migrant Workers, Nationals of the Republic of Kazakhstan, Temporarily Employed on the Territory of the Republic of Tajikistan, and the Employment and Protection of the Rights of the Migrant Workers, Nationals of the Republic of Tajikistan, Temporarily Employed on the Territory of the Republic of Kazakhstan / Decree of the Government of the Republic of Kazakhstan No.359 dated 03 May 2006 // *https://adilet.zan.kz/rus/docs/P060000359_*

- Develop a mechanism of complaint to be brough forward by any of the participating parties in cases where contracts are broken.
- As a very high proportion of returnee migrants and prospective migrants did not know that recruitment agencies were an option in job search, there is a need to promote SRAs, better communication strategy to incentivize migrants to use organized recruitment systems.
- The needs of migrants in terms of contract negotiations could be met by improving the optimal package of the job seeker in the recruitment agencies, developing contract formats and standards that make agencies more attractive to migrants.
- It is necessary to strengthen the cooperation between private/public VETs and private/public recruitment agencies in Kyrgyzstan.

v. Country-specific recommendations – Tajikistan

- There is a need to offer free courses for learning the languages of those countries where most job seekers end up going, as well as to study the history and legislation of those countries.
- Tajikistan and Kyrgyzstan could exchange good practices and learn from the experience of Uzbekistan on communication strategies and outreach to potential labour migrants (as 64 per cent of the Uzbek prospective migrants intend to look for a job through SRAs this is a good sign that awareness campaigns about SRA and PRA services appear to be more effective in Uzbekistan than in other Central Asian countries).
- Improved coordination of the VET and their relations with PRA/SRA and/or even employers could improve the value of these services to migrants and employers.

vi. Country-specific recommendations – Uzbekistan

- Recognizing the anticipated growth of organized recruitment between Uzbekistan and the Russian Federation, it will be important to increase staffing levels and training of new staff, as well as to look at infrastructure needs and management structure to build efficiencies and scale into operations.
- With a sufficiently deep and voluminous regulatory framework compiled over the past five years, the impression may be that the system created is ideal, however, information from both prospective migrants and employers indicate that there are still significant improvements to be made for organized recruitment systems to continue to be attractive, particularly as borders reopen and informal recruitment channels once again become more accessible.
- Third-party support is required to assess the structures and resources of the SRAs in order to make recommendations on how to upscale activities and improve efficiencies in the system.
- Russian language barrier has been indicated as one of the most important problems of migrants and needs to be addressed in a more flexible and long-term way.

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