



ASSESSMENT

**AMONG CITIZENS OF
RUSSIAN FEDERATION,
UKRAINE AND BELARUS
LIVING IN ARMENIA**

ASSESSMENT

**AMONG
CITIZENS
OF
RUSSIAN
FEDERATION,
UKRAINE AND
BELARUS
LIVING IN
ARMENIA**

July 2023



The opinions expressed in this publication are those of the authors and do not necessarily reflect the views of the International Organization for Migration (IOM). The designations employed and the presentation of material throughout the publication do not imply expression of any opinion whatsoever on the part of IOM concerning the legal status of any country, territory, city or area, or of its authorities, or concerning its frontiers or boundaries.

IOM is committed to the principle that humane and orderly migration benefits migrants and society. As an intergovernmental organization, IOM acts with its partners in the international community to: assist in meeting the operational challenges of migration; advance understanding of migration issues; encourage social and economic development through migration; and uphold the human dignity and well-being of migrants.

This research publication was made possible through support provided by the Migration Resource Allocation Committee (MIRAC).

Publisher: International Organization for Migration
UN House, 14 Petros Adamian Street, 1st
floor, Yerevan 0010, Armenia
Tel.: +37410585692
Email: iomarmenia@iom.int
Website: www.iom.int/countries/armenia

Cover: Caption. © IOM 2023/Aram Urutyanyan

© IOM 2023



For further specifications please see the [Copyright and Terms of Use](#).

This publication should not be used, published or redistributed for purposes primarily intended for or directed towards commercial advantage or monetary compensation, with the exception of educational purposes, e.g. to be included in textbooks.

Acknowledgements

This report is a result of close collaboration between Prisma LLC and International Organization for Migration (IOM) in Armenia. The research team highly appreciates the support, feedback and guidance received from IOM Armenia team.

The RA Ministry of Economy and Migration and Citizenship Service of Armenia were engaged in the process of the assessment from the very beginning, as key state stakeholders. Prisma highly values the support received from them starting from the methodology design to the provision of valuable feedback to the report.

The assessment team also thanks the Agency for State Register of Legal Entities of the Ministry of Justice of RA, Cadaster Committee of RA and mobile network operators for their support during the data collection process.

The work of those interviewers and moderators who conducted accurate and timely work in the field has been the backbone of the assessment and is strongly acknowledged by Prisma LLC and IOM.

Last, but not least, the assessment team thanks all stakeholders and people who participated in the assessment and shared their views and ideas openly.

Report prepared: Shushan Ghahriyan

Report edited: Liana Poghosyan

Prisma LLC

Contents

Acronyms.....	5
Executive Summary.....	6
KEY FINDINGS.....	7
1. Introduction.....	13
2. Methodology.....	14
3. The Number of Russian, Ukrainian, and Belarusian Citizens Moved to Armenia.....	17
4. Key Findings.....	24
4.1 Survey among People from the Russian Federation, Ukraine and Belarus.....	24
4.1.1 Profile of the Surveyed Population.....	24
4.1.2 Reasons for Leaving Their Home Country and Moving to Armenia.....	36
4.1.3 Intentions and Plans of Study Population to Stay in Armenia.....	39
4.1.4 Life in Armenia.....	42
4.1.5 Resources and Services Needed to Better Organize Their Lives in Armenia.....	52
4.1.6 Financial Support/grant as an Incentive to Set Up a Start-up/business in Armenia.....	54
4.1.7 Challenges Faced by Study Population and Their Families.....	56
4.1.8 Impact of Study Population on Armenian Society: Positive Changes and Contributions.....	59
4.2 Survey Among Relocated Companies from the Russian Federation and Belarus.....	60
4.2.1 Profile of Surveyed Companies.....	60
4.2.2 Intentions of Companies Relocated to Armenia.....	61
4.2.3 Resources and Services for Improved Company Operations in Armenia.....	61
4.2.4 Issues and Needs of Surveyed Companies in Armenia.....	63
5. Conclusion and Recommendations.....	66

Acronyms

EEU	Eurasian Economic Union
GoA	Government of Armenia
IOM	International Organization for Migration
ICT	Information and Communications Technologies
KII	Key Informant Interview
LLC	Limited Liability Company
MFA	Ministry of Foreign Affairs
RA	Republic of Armenia
RF	Russian Federation

Executive Summary

The war in Ukraine resulted in the displacement of millions of Ukrainians¹ and the migration of hundreds of thousands of Russian Federation and Belarusian citizens.² Armenia became one of the main migration destinations for these people, especially the ones from the Russian Federation (RF).

The purpose of this assessment was to gather comprehensive information and present an **informed estimate** of the number of Russian, Ukrainian, and Belarusian citizens who have moved to Armenia for temporary residence. Additionally, the study aimed at analyzing their demographic profiles, understanding their plans, and identifying the main challenges faced. This is second phase of the similar assessment conducted in June 2022. Hence, both the current assessment findings, as well as the comparison with the results of the previous assessment are described in this report.

To reach the purpose of the assessment, a mixed-methods approach based on secondary and primary (qualitative and quantitative) data collection and analysis was applied³.

It is important to acknowledge that this assessment is subject to certain limitations, which are further elaborated below. As such, it cannot be considered fully representative of the entire migrant population. However, the data collected from multiple sources, combined with qualitative data reaching theoretical saturation, provide substantial evidence to support the study's objectives and arrive at robust conclusions.

¹ UNHCR, Ukraine Refugee Situation, <https://data2.unhcr.org/en/situations/ukraine>

² BBC Russia, 04.06.2023 Why are people leaving Russia, who are they, and where are they going? <https://www.bbc.com/news/world-europe-65790759>

The Washington Post, 13.02.2023, Russians abandon wartime Russia in historic exodus

³ A survey was conducted among 645 citizens of RF, Ukraine, and Belarus, 40 semi-structured interviews - with representatives of companies operating in Armenia and owned by the citizens of the mentioned countries, and 9 KIs - with representatives of state and non-state entities. In addition, statistical information was inquired from various state bodies.

KEY FINDINGS

Estimated Number of Russian, Ukrainian, and Belarusian Citizens Residing in Armenia

The analysis of the data acquired in the scope of this assessment leads to an informed conclusion that the **estimated** number of Russian, Ukrainian, and Belarusian citizens temporarily living in Armenia ranges from **53,000** to **58,000** (of whom more than 90% are from RF). This number has increased by approximately **20,000** over the last year.

Some statistical data collected from various state agencies served as additional proxy indication of the increase presented above. Specifically, the influx and outflux numbers of Russian, Ukrainian, and Belarusian citizens to and from Armenia have almost **doubled** when comparing the months of February-March 2022 with the same months of 2023. The number of citizens of the targeted countries who have submitted applications on the www.workpermit.am platform to obtain a work permit and residency card in Armenia has also gradually grown reaching from 498 at the end of May 2022 to **9,923** at the end of March 2023. The same growing tendency is observed with the number of legal entities registered by mentioned citizens in Armenia (increasing from 2,696 at the end of April 2022 to **9,228** as of the end of March 2023). In addition, between March 2022 and February 2023, **1,273** (742 in Yerevan) real estate purchases were made by Russian, Ukrainian, and Belarusian citizens.

The Profile of the Surveyed Population

The general profile of respondents who moved to Armenia has largely remained the same compared to 2022 and represents the following characteristics: the vast majority (**95.5%**) are citizens of RF, aged from 18 to 45 (**93.9%**), with a high level of education (**74.0%**), employed (**85.7%**) or owning a business (**6.2%**), represent the IT sector (**76.8%**) and live in Yerevan (**74.9%**). More than half of the surveyed population (**61.1%**) is in Armenia with their spouses/partners, and a smaller portion also with children (**21.4%**). The majority of

the respondents' spouses (**61.5%**) are also employed. The unemployment rate among female respondents is higher compared to men (**15.6%** vs. **5.3%**).

Overall, the qualitative data reveals that people from the mentioned countries who moved to RA can be categorized into three distinct groups: 1) individuals who arrived in Armenia after the full-scale war, mainly due to work-related or political reasons; 2) their families who came for reunification; and 3) individuals who arrived from RF after September 22 to avoid conscription.

Reasons for Leaving their Home Country and Moving to Armenia

The primary reasons behind respondents' decision to leave their country of origin and move to Armenia, were the war (**67.3%**), lack of security and safety in their home country (**52.2%**), work opportunities (**44.8%**), and partial mobilization (**39.7%**).

These findings suggest that while war-related factors and concerns about security remain significant reasons for migration both before and after the partial mobilization, the prominence of work opportunities as a motivating factor appears to have decreased for those who moved to Armenia after the partial mobilization.

Qualitative data further provides insights into why people chose Armenia as their preferred destination. Those include: a) easy travel between Russia and Armenia due to the absence of an international passport requirement for entry and exit as well as availability of direct flights; b) the widespread knowledge of the Russian language among the local population; c) the absence of negative attitudes or discrimination; d) the availability of banking services and the acceptance of Russian "Mir" credit cards by Armenian financial institutions.

Intentions and Plans of Surveyed Population

48.1% of the surveyed respondents expressed their intention to stay in Armenia for a year or more. A significant disparity in intentions between the first and this assessment was observed, with a notable increase in the percentage of respondents expressing uncertainty about their plans regarding staying in Armenia (from **6.3% in 2022** to **29.6% in 2023**). The remaining 22.3% indicated their intention to remain in Armenia for less than a year.

Qualitative data reveals that for those who choose to depart from Armenia, the decision is influenced by a combination of factors which include the attraction of better prospects elsewhere, and concerns over the geopolitical situation and the potential for regional conflicts.

Life in Armenia

The majority of respondents (**94.6%**) reside in rented apartments or houses, with **79.6%** having signed rental agreements. **69.4%** of respondents are confident that they can remain in their current accommodation for as long as they need it.

With regard to education, **68.9%** of respondents with children mentioned that their children attend educational institutions in Armenia.

66.2% of respondents have applied for health care services, with **86.0%** mentioning satisfaction with the service received.

The vast majority of respondents (**91.2%**) did not experience a negative attitude or discrimination as foreigners in Armenia. However, a considerable number of respondents mentioned feeling stressed/anxious (**34.4%**) and experiencing feelings of depression and/or loneliness (**25.2%**). The pattern is quite similar compared to the previous assessment conducted in June 2022

Resources and Services Needed to Better Organize Their Lives in Armenia

Key areas where support is desired include a) language classes (**55.9%**); b) counseling on legal residence documents and procedures (**50.6%**); c) accessible information on available services (**50.0%**); and d) assistance with opening bank accounts (**40.1%**).

Key informants suggest establishing an information support center for migrants and displaced people to provide assistance in navigating for necessary services and receiving counseling on legal matters.

Financial Support/grant as an Incentive to Set Up a Start-up/business in Armenia

Financial assistance could become an incentive to initiate a business in Armenia for **34.9%** of respondents.

As for the amount of financial support needed to establish a start-up/business, respondents mentioned an average of 33,000 USD. In terms of their readiness to invest an average amount of 12,500 USD was indicated.

Challenges Faced by Respondents and Their Families

The top challenges faced by respondents from RF, Ukraine, and Belarus in RA include: a) high accommodation rental prices and the quality of accommodation **(35.9%)**; b) the quality of transport, traffic, and risky driving of drivers **(20.5%)**; c) concerns regarding ecology and urban environment, including city and air pollution **(18.9%)**; d) problems related to the quality of infrastructure such as roads, electricity, and water cuts **(18.5%)**; and e) dissatisfaction with banking services **(15.4%)**.

A comparison with the previous assessment conducted in 2022 shows that the top five problems have remained the same, although the order has changed. Notably, dissatisfaction with banking services, which was the second most mentioned problem in the previous assessment, has decreased in frequency during this assessment.

Profile of Surveyed Private Companies

Out of the 40 interviewed companies, the vast majority relocated to Armenia from RF. These companies are primarily based in Yerevan, with a few located in nearby cities. The IT sector dominates, followed by the hospitality, healthcare, education, and marketing sectors.

Looking ahead, every third company interviewed expects an increase in the number of employees in the coming months.

Intentions of Companies Relocated in Armenia

Almost all interviewed companies intend to stay in Armenia for more than 12 months. The primary reasons cited for this decision are the political and economic situation in RF in general, and sanctions against RF in particular.

Resources and Services for Improved Company Operations in Armenia

The most sought-after resources mentioned by participants include accessible information on available services, legal counseling, and language classes.

The importance of small grant projects or subsidies for the businesses that moved to Armenia was also mentioned by many companies. At the same time, it is important to note that the GoA does offer several subsidy projects to all business entities registered and

operating in Armenia, however, none of the interviewed companies was aware of this. A few companies also indicated facing challenges such as internet-related issues, a shortage of qualified staff, and high rental prices for workspace.

In conclusion, this assessment offers data on the estimated number of Russian, Ukrainian, and Belarusian citizens residing in Armenia, on their profile, intentions and needs, which can serve as a valuable reference for policymakers, service providers, and organizations interested in addressing the needs of migrants and displaced people in Armenia.

Presented below is a summarized compilation of the **recommendations**, offering an overview of the suggested measures to tackle the challenges and facilitate the successful integration of migrants and displaced individuals into Armenian society.

- The GoA and donor organizations to consider the possibility of establishment of an information support center for migrants and displaced people. This can be either an independent center operating in close collaboration with the GoA and IOM, or a separate function within the RA Migration and Citizenship Service. The center can offer a range of services, including language classes, legal counseling, job search assistance, professional (re)orientation and training, accommodation support, information on available services and state subsidy programs, support with applying to those, etc.
- Empower local authorities and stakeholders through comprehensive capacity-building initiatives, enabling them to deliver appropriate and inclusive services to migrants and displaced people.
- Facilitate a comprehensive and in-depth assessment of the services provided to migrants and displaced people by local authorities and stakeholders, coupled with a rigorous feasibility study.
- The GoA and donor organizations to consider the potential and the needs of people from the mentioned countries as a specific target group for programs aimed at promoting SME development in Armenia.
- The GoA and donor organizations to work towards developing mechanisms and incentives to encourage SME development outside of Yerevan specifically among individuals from the mentioned countries.
- The GoA and donor organizations to consider the possibility of establishment of partnership platforms for local businesses and businesses that have moved to Armenia for stronger professional collaborations and human resource management.

- The GoA and donor organizations to promote the development of interventions that effectively address and enhance the interactions between migrants and displaced people and host community, fostering inclusive societal integration.
- The GoA and donor organizations to create comprehensive and accessible Mental Health and Psychosocial Support (MHPSS) opportunities tailored to the unique needs of migrants and displaced people.

1. Introduction

The full-scale war in Ukraine, which commenced on 24th of February 2022 led to the displacement of millions of Ukrainians⁴. However, it also resulted in the migration of hundreds of thousands of Russian Federation and Belarusian citizens seeking safety and stability. Armenia, among other countries, emerged as one of the primary destinations for these individuals.⁵ One year after the full-scale war started, these people continue living in Armenia, and the influx of newcomers, particularly from RF, still continues (Table 2).

This report presents the findings of the second assessment conducted among the citizens of RF, Ukraine, and Belarus who moved to Armenia since the full-scale war in Ukraine, with the first assessment having taken place in June 2022. The purpose of this assessment was to gather comprehensive information on the number of Russian, Ukrainian, and Belarusian citizens who have moved to Armenia. Additionally, the study aimed at analyzing their demographic profiles, understanding their intentions and plans, and identifying the main challenges and issues faced by individuals temporarily residing in RA.

The subsequent sections of this report will delve into the data collected, presenting a comprehensive analysis and insights of the situation.

⁴ UNHCR, 27.06.2023, Ukraine Refugee Situation, <https://data2.unhcr.org/en/situations/ukraine>

⁵ BBC Russia, 04.06.2023 Why are people leaving Russia, who are they, and where are they going? <https://www.bbc.com/news/world-europe-65790759>

The Washington Post, 13.02.2023, Russians abandon wartime Russia in historic exodus

2. Methodology

To reach the purpose of the assessment, a mixed-methods approach based on the qualitative and quantitative data was applied, which helped to triangulate information from different sources and have a more comprehensive and accurate picture.

Methods used during the assessment included information inquiries sent to various state bodies, survey among 18+ citizens of RF, Ukraine, and Belarus living in Armenia, semi-structured interviews with individual entrepreneurs and representatives of the companies moved to Armenia from the above-mentioned countries as well as key informant interviews (KIs) with various stakeholders.

Information Inquiry: The following data was inquired from the Migration and Citizenship Service of the Republic of Armenia (RA), the Agency for State Register of Legal Entities of the Ministry of Justice of RA, the Cadaster Committee of RA and from three mobile operators of Armenia:

- the number of entries and exits of the Russian, Ukrainian, and Belarusian citizens to Armenia from the end of February 2022 to the end of March 2023,
- the number of applications for the certificate on legal residency for the employment purposes from the end of February 2022 to the end of March 2023,
- the number of applications for the RA citizenship from the end of February 2022 to the end of March 2023,
- the number of registered legal entities by the citizens of the mentioned countries from the end of February 2022 to the end of March 2023,
- the number of purchased real estate properties by the citizens of the mentioned countries in Armenia from March 2022 to the end of February 2023,
- the number of sim cards sold by the mobile operators to the citizens of the mentioned countries,

- the number of sim cards sold to the citizens of the mentioned countries and active during the last week of March 2023.

Survey: The survey was conducted among 18+ citizens of RF, Ukraine, and Belarus who moved to Armenia, using face-to-face, telephone and online survey methods. Two types of survey questionnaires were used: a) full questionnaire for face-to-face and telephone surveys; and b) slightly shortened, self-administered questionnaire for online survey. In total **151** surveys were conducted face-to-face and by phone, and **494** filled questionnaires were received through online survey. Hence, the assessment findings around the main questions of the survey, such as the profile of respondents, their intentions, challenges experienced in Armenia, as well as assistance needed for establishing a business/start-up, represent responses of **645** participants, while the additional analysis on more specific topics such as education, healthcare, etc., is based on the responses of **151** participants of the survey.

Semi-structured interviews: Semi-structured interviews were conducted with the representatives of legal entities relocated and registered in Armenia to understand their plans for future and major challenges of the relocated companies. In total, **40** semi-structured interviews were conducted with the representatives of legal entities registered or relocated to Armenia.

Key Informant Interviews: In order to obtain additional perspective and insights, **9** KIIs were conducted with representatives of both state and non-state entities and organizations working with and for citizens moved to Armenia from RF, Ukraine, and Belarus since the beginning of the war.

Limitations

Based on the available secondary data obtained during this assessment, the estimated number of citizens from RF, Ukraine, and Belarus in Armenia is approximately 53-58 thousand (refer to the Section 3 of the report). The sample size for that population considering 95% confidence level and 5% margin of error is 382, while for 4% margin of error it is 594, respectively. Despite the fact that in total 645 citizens of RF, Ukraine, and Belarus participated in the survey conducted in the scope of this assessment, the findings cannot be considered as **fully** representative of the overall population due to the following limitations:

- No random sampling technique was applied, since there was no sampling frame for the general population of the migrants and displaced people,

- Survey was conducted through various methods (face-to-face, phone-based and online self-administered surveys) and then the databases were combined for the analysis.

Another limitation of the study relates to the inquiry regarding discrimination, antipathy, and negative behavior. Given that a portion of the survey was conducted through face-to-face and telephone interviews, where the interviewers were Armenians, it is possible that some respondents may have been hesitant to provide candid responses due to the sensitive nature of the topic. This could have resulted in underreporting of the negative experiences. Furthermore, since the survey did not provide a specific definition of discrimination, respondents may have varied interpretations of the concept, leading to diverse perceptions and potential inconsistencies in their responses.

Overall, despite the mentioned limitations, the quantitative data collected from 645 participants triangulated with the qualitative data and secondary data obtained from various sources provides sufficient evidence to have solid findings with regard to the study questions.

3. The Number of Russian, Ukrainian, and Belarusian Citizens Moved to Armenia

The assessment conducted a comprehensive analysis of secondary data from various sources to make an **informed estimation** regarding the current number of citizens from RF, Ukraine, and Belarus residing in Armenia at the time of assessment.

The main methodological approach applied by assessment team to arrive to the estimated number of the Russian, Ukrainian, and Belarusian citizens is as follows:

Step 1. Estimate the net number of citizens of the mentioned countries physically present in Armenia the last week of March 2023⁶.

Step 2. Apply to that number the % of citizens of the mentioned countries, who have mentioned about their plans to stay in Armenia for more than 6 months. Use the result (with $\pm 5\%$) as estimated number of citizens of RF, Ukraine, and Belarus who have moved to Armenia for temporary residence.

Step 3. Collect additional proxy data to compare with the above result and validate and/or adjust the estimation.

STEP 1. The secondary data review, as well as the experience of the Phase 1 assessment⁷, conducted in 2022, showed that the most telling source of proxy data indicating the actual number of study population in Armenia is the number of SIM cards sold by mobile phone

⁶ The inflow and outflow data shows, that the respective rates are smallest for the months January-March both for 2022 and 2023, hence to have the most up to date estimation, which is not influenced by touristic season, the data for the last week of March 2023 is used.

⁷ The first assessment was conducted in June 2022 by Prisma LLC funded by IOM

operators in Armenia to citizens of RF, Ukraine, and Belarus. Moreover, the number of **active** SIM cards during the certain period indicates the physical presence of the card holder in Armenia. Hence, the assessment team sent an inquiry to all 3 telecom operators in Armenia, requesting data on: a) number of SIM cards sold to the citizens of the mentioned countries between August 2022 and March 2023; and b) number of SIM cards of those citizens that were “active” during the last week of March 2023. Unfortunately, only one operator provided the requested information, which is presented in Table 1. According to the provided data, this operator sold a total of 39,262 SIM cards to citizens of RF, Ukraine, and Belarus between August 2022 and March 2023. Out of these, **23,712** SIM card holders did use their cards within the territory of the RA during the last week of March, meaning that they were physically present in the country.

Table 1. The number of sold sim cards of a mobile operator during the period of August 2022-March 2023

	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23
Number of sold sim cards	4,725	7,473	8,150	3,952	3,919	3,561	3,741	3,741
Total	39,262							
Active as of the last week of March 2023	23,712							

Due to the unavailability of data from other 2 mobile operators, the assessment team made additional estimations to determine the number of subscribers with Russian, Ukrainian, and Belarusian passports for those operators. The basis for this estimation is proportional distribution of **all** telecom subscribers in Armenia among all three mobile operators in the country.

By applying the subscription proportions for each operator during the first three months of 2023⁸ and utilizing the available data from one operator, the calculations indicate an estimated total of **96,355** people with Russian, Ukrainian, and Belarusian passports being present in Armenia for different reasons the last week of March 2023.

⁸ MTS Armenia has the highest number of subscribers, totaling 2,261,974 during the first three months of 2023, source: https://www.mts.am/docs/default-source/psrc-2023/psrc_report_1q23_arm.pdf?sfvrsn=ba41c620_2
 Team Telecom Armenia follows with 951,967 subscribers, source: https://www.telecomarmenia.am/file_manager/Results%20&%20Reporting/telecom_2023/mpb_q1_2023_arm.pdf
 Ucom Armenia comes next with 654,412 subscribers, source: https://www.ucom.am/file_manager/reports/mobile-2023/Mobile_2023_1_arm.pdf
 Consequently, the subscriber proportions for each operator are as follows: MTS Armenia - 58% of total, Team Telecom Armenia - 25%, and Ucom Armenia - 17%.

STEP 2. The assessment shows that 57.6% of respondents intend to stay in Armenia for more than 6 months. Hence, the estimated number of citizens of RF, Ukraine and Belarus, who have moved to Armenia for temporary residence can be estimated as $96,355 * 57.6\% = 55,500$. Application of 5% variation, brings to the final estimated **number of citizens from RF, Ukraine, and Belarus temporarily residing in Armenia being within the range of 53,000 and 58,000**, the vast majority of whom are citizens of RF. It is worth noting that, similar estimation conducted in June 2022, has resulted in the same number being within the range of 30,000 to 35,000, indicating that the number of Russian, Ukrainian, and Belarusian citizens in Armenia has increased by about **20,000** in one year.

STEP 3. Additional statistical information was inquired from various state institutions to serve as proxy data for further analysis. According to information obtained from the Migration and Citizenship Service of RA, 1,226,687 Russian citizens arrived in Armenia, while 1,198,682 departed from the country between February 2022 and March 2023. Similarly, there were 34,722 entries of Ukrainian citizens into Armenia, with 32,880 exits recorded. Additionally, 22,766 citizens of Belarus entered Armenia, while 22,217 left during the same time frame (Table 2).

In total, there is a difference of **30,396** between the number of entries and exits during the mentioned period. However, it is important to acknowledge that the assessment subject group is **highly mobile**, and individuals may have multiple entries and exits. Therefore, these figures can only provide an understanding about the in and out flow scale. At the same time, the comparison of the February and March data for 2022 and 2023 shows that in 2023 the in and out flows have almost doubled compared to 2022. This, in turn, can be a proxy indication of the overall increase in number of Russian, Ukrainian, and Belarusian citizens in Armenia.

Table 2. The number of Russian, Ukrainian, and Belarusian citizens that crossed RA border during the period of February 2022-March 2023

	Russian citizens			Ukrainian citizens			Belarusian citizens		
	Entries	Exits	Difference	Entries	Exits	Difference	Entries	Exits	Difference
February 2022	40,036	38,548	1,488	1,597	160	1,437	758	595	163
March 2022	54,700	44,438	10,262	2,262	1,498	764	3,678	3,138	540
April 2022	55,070	48,323	6,747	1,952	1,739	213	1,209	1,339	-130
...									
July 2022	144,465	117,631	26,834	2,738	2,651	87	2,277	2,158	119
August 2022	138,099	166,867	-28,768	3,115	3,070	45	2,194	2,262	-68
September 2022	132,034	128,702	3,332	3,010	3,318	-308	2,279	2,397	-118
October 2022	129,074	113,604	15,470	29,66	3,114	-148	2,170	2,134	36
November 2022	100,465	109,584	-9,119	3,084	3,069	15	1,674	1,669	5
December 2022	113,606	96,984	16,622	3,796	3,508	288	1,424	1,507	-83
January 2023	109,814	120,383	-10,569	3,294	3,497	-203	1,556	1,444	112
February 2023	97,511	98,526	-1,015	3,281	3,443	-162	1,694	1,704	-10
March 2023	111,813	115,092	-3,279	3,627	3,813	-186	1,853	1,870	-17
Total	1,226,687	1,198,682	28,005	34,722	32,880	1,842	22,766	22,217	549

Additional information obtained from the Migration and Citizenship Service of RA, again shows in general growing trend of the number of citizens of RF, Ukraine, and Belarus who have submitted applications on the www.workpermit.am platform to obtain a residency card in Armenia⁹ (Table 3) as well as number of citizens of those countries applying for the Armenian citizenship (Table 4).

⁹ According to the Government of Armenia Decree # 2087, 2021, citizens of the member states of the Eurasia Economic Union (EEU), as well as their family members, can register in the workpermit.am portal and obtain a certificate confirming that their residency in the RA is legal.

As for the citizens of Ukraine, they need to register in the platform and obtain temporary residence status on the basis of employment.

Source: United electronic platform of the work permit for foreigners, EAEU citizens are exempt from work permits, <https://workpermit.am/en/news/3>.

Table 3. The number of people applied for residency card in Armenia during the period of February 2022-March 2023

	Russia	Ukraine	Belarus
February-May, 2022	456	26	16
July 2022	796	5	25
August 2022	1,028	15	17
September 2022	1,173	11	35
October 2022	1,186	4	20
November 2022	1,218	7	27
December 2022	882	8	12
January 2023	912	5	15
February 2023	1,019	10	17
March 2023	946	12	20
Total	9,616	103	204

Table 4. The number of people applied for Armenian citizenship during the period of February 2022-March 2023

	Russia	Ukraine	Belarus
February-May, 2022	2,848	50	12
July 2022	2,097	34	9
August 2022	1,899	27	9
September 2022	1,975	31	2
October 2022	2,264	13	13
November 2022	2,896	41	14
December 2022	1,630	15	8
January 2023	1,024	16	2
February 2023	1,295	12	15
March 2023	1,346	13	8
Total	19,274	252	92

As for Armenian citizenship, considering the legislative requirements, it can be reasonably assumed that the majority of these individuals are of Armenian descent, and in some cases, their spouses are Armenian citizens.¹⁰

Additional data was obtained from the Agency for State Register of Legal Entities of the Ministry of Justice of RA regarding the number of legal entities registered in Armenia by citizens of RF, Ukraine, and Belarus from the end of February 2022 to the end of March 2023. As indicated in the table below, Russian citizens registered 2,613 limited liability companies (LLCs) and 6,248 individual entrepreneurs, while Ukrainian citizens registered 70 LLCs and 67 individual entrepreneurs. Belarusian citizens, on the other hand, registered 101 LLCs and 129 individual entrepreneurs (Table 5). Despite the fact that durations for the Phase 1 and Phase 2 data are not equal, still the overall increase of the legal entities registered in Armenia is observed throughout the data.

Table 5. The numbers of legal entities registered in Armenia during the period of February 2022-March 2023

Type of legal entity		Russia	Ukraine	Belarus
Limited Liability Company (LLC)	Phase 1 February-April, 2022	856	16	34
	Phase 2 May, 2022-March 2023	1,757	54	67
Individual entrepreneurs	Phase 1 February-April, 2022	1,710	17	63
	Phase 2 May, 2022-March 2023	4,538	50	66
Total		8,861	137	230

Furthermore, data was requested from the Cadaster Committee of the RA regarding the number of real estates purchased by citizens of RF, Ukraine, and Belarus in Yerevan and various regions of Armenia from March 2022 to February 2023. As demonstrated in the table below, the majority of real estate purchases were made by Russian citizens (1,254), with a smaller number by Ukrainian citizens (18), predominantly in the capital city of Yerevan.

¹⁰ The general requirements of becoming an Armenian citizen include living in Armenia for the last 3 years, good knowledge of Armenian and acquaintance with the Constitution of Armenia. Procedure of acquiring Armenian citizenship is simplified for ethnic Armenians, for spouses of Armenian citizens, for children of former Armenian citizens and for persons who have terminated Armenian citizenship after 1995. For these cases, the requirements of Armenia based residence for at least 3 years and the knowledge of Armenian do not apply.

Sources: MFA website, Citizenship, <https://www.mfa.am/en/citizenship>, Law of the Republic of Armenia on Citizenship of the Republic of Armenia, <https://www.arlis.am/documentview.aspx?docid=57692>

Table 6. The number of real estates purchased by the citizens of RF, Ukraine, and Belarus during the period of March 2022-February 2023

	Russia	Ukraine	Belarus
Yerevan	730	12	0
Aragatsotn	23	0	0
Ararat	44	2	0
Armavir	71	0	0
Gegharkunik	13	0	0
Lori	45	0	0
Kotayk	158	1	1
Shirak	83	0	0
Syunik	12	2	0
Vayots Dzor	6	0	0
Tavush	69	1	0
Total regions	524	6	1
Total RA	1,254	18	1

4. Key Findings

4.1 Survey among People from the Russian Federation, Ukraine and Belarus

4.1.1 Profile of the Surveyed Population

Demography: This section provides an overview of the demographic data of the surveyed individuals from RF, Ukraine, and Belarus. The data reveals that more than 70% of the respondents are male, while 27.0% are female (Figure 1). In terms of age distribution, the largest portion of respondents falls within the 26-35 years old category, accounting for 57.2% of the total. Furthermore, 20.9% of the respondents are in the 36-45 years old range, and 15.8% are between 18-25 years old (Figure 2).

Figure 1. Distribution of surveyed respondents per gender (n=645)

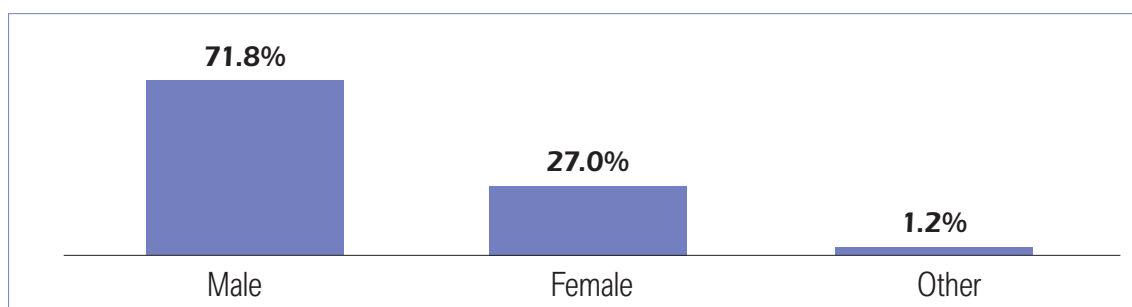
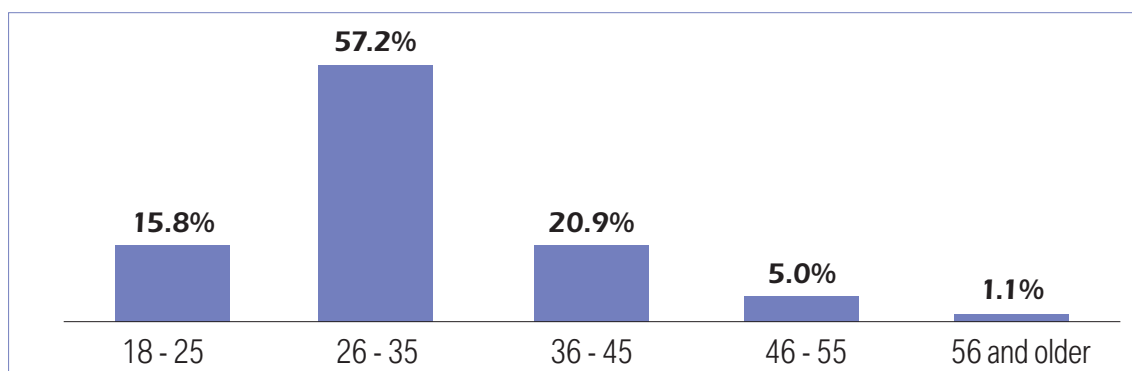
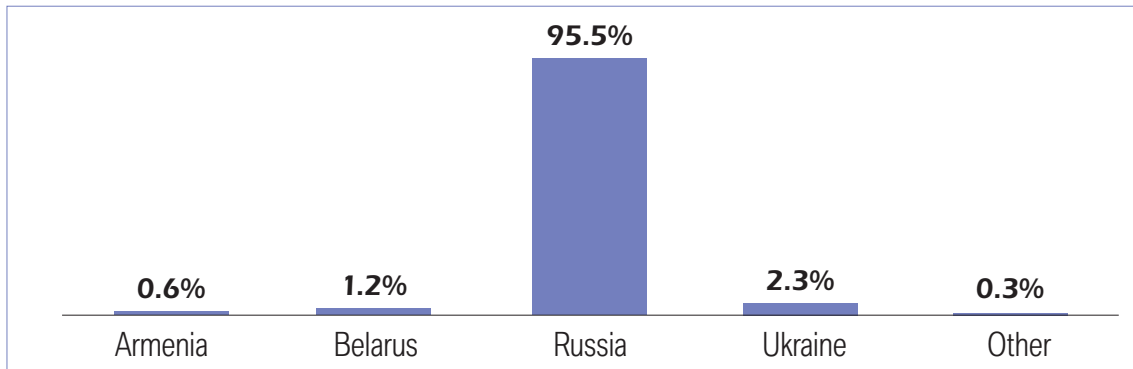


Figure 2. Distribution of surveyed respondents per age group (n=645)



Citizenship: The vast majority of respondents (95.5%) hold Russian citizenship, while 2.3% have Ukrainian citizenship, and 1.2% possess Belarusian citizenship (Figure 3).

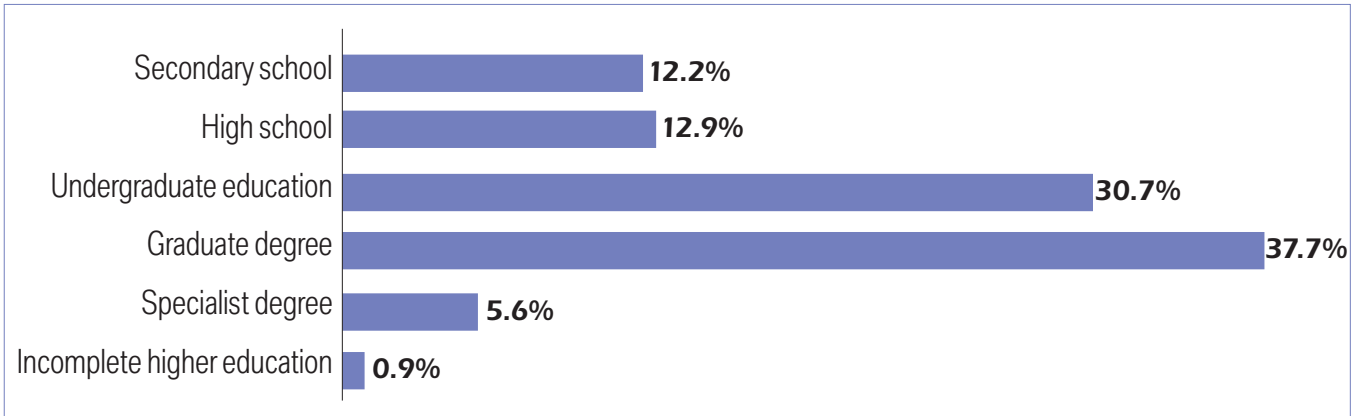
Figure 3. Distribution of surveyed respondents per country of citizenship (n=645)



In addition to their main citizenship, respondents were also asked about having or applying for citizenship in other countries. The data shows that 6.4% of the respondents (40 respondents) reported having or applying for citizenship in another country. Among these respondents, half (50% or 20 respondents) reported having or applying for Armenian citizenship and additional, 30% (12 respondents) stated that they have or have applied for citizenship in various countries such as Israel, Moldova, other European countries, and so on. Furthermore, 12.5% (5 respondents) of them reported having Russian citizenship in addition to their main citizenship, and 7.5% (3 respondents) reported having Ukrainian citizenship in addition to their main citizenship.

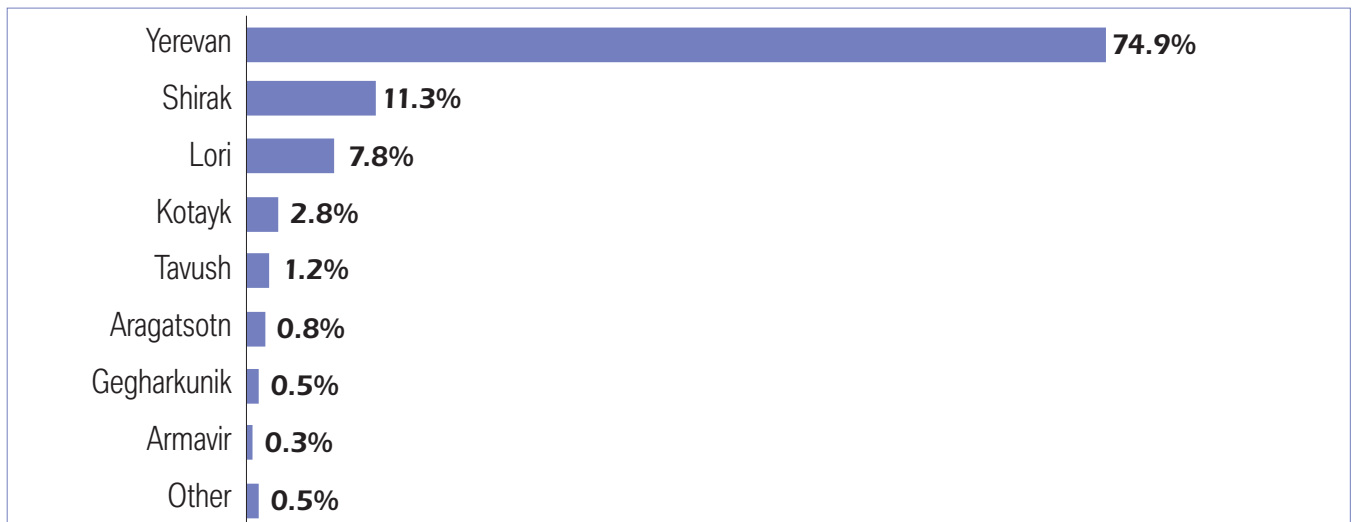
Level of Education: The majority of respondents (74.0%) hold a higher education degree (30.7% - bachelor's degree, 37.7% - masters' degree or higher, 5.6% - university diploma (5-year), while 0.9% have incomplete higher education. The remaining respondents have completed their education at the school level, with 12.2% having a secondary school education and 12.9% having a high school education (Figure 4).

Figure 4. Distribution of surveyed respondents per level of education (n=645)



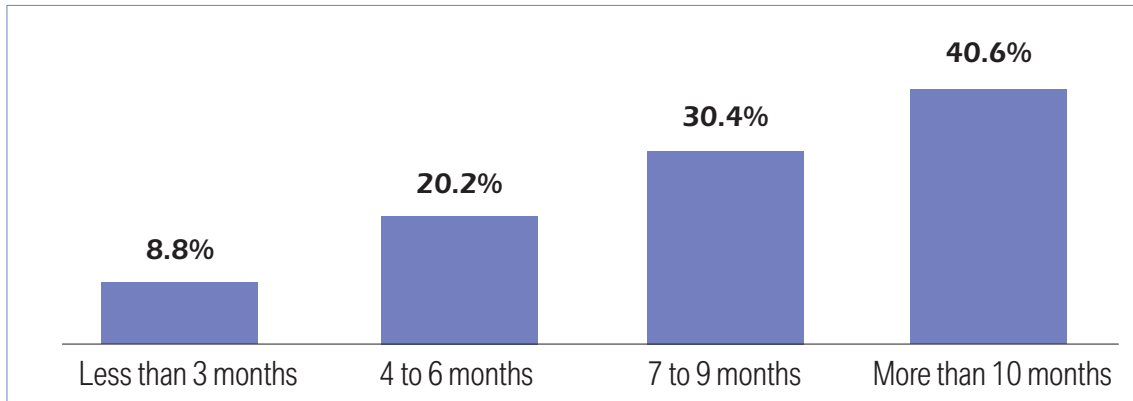
Place of Residence: The majority of surveyed respondents (74.9%) reside in Yerevan, the capital city of Armenia. Additionally, 11.3% of respondents live in the Shirak region, primarily in Gyumri, which is the second-largest city in Armenia. Furthermore, 7.8% of respondents live in the Lori region, mainly in Vanadzor, the third-largest city in Armenia. Another 2.8% of respondents reside in various settlements within the Kotayk region, which is the region closest to Yerevan, including Hrazdan and Abovyan cities. 1.2% of respondents live in the Tavush region, mainly in Dilijan (Figure 5).

Figure 5. Distribution of surveyed respondents place of residence (n=645)



Migration Period: Overall, 40.6% of the respondents have been living in Armenia for more than 10 months. Another 30.4% have been residing in Armenia for 7 to 9 months, while 20.2% have been living in Armenia for 4 to 6 months (Figure 6).

Figure 6. Duration of the stay in Armenia (n=645)

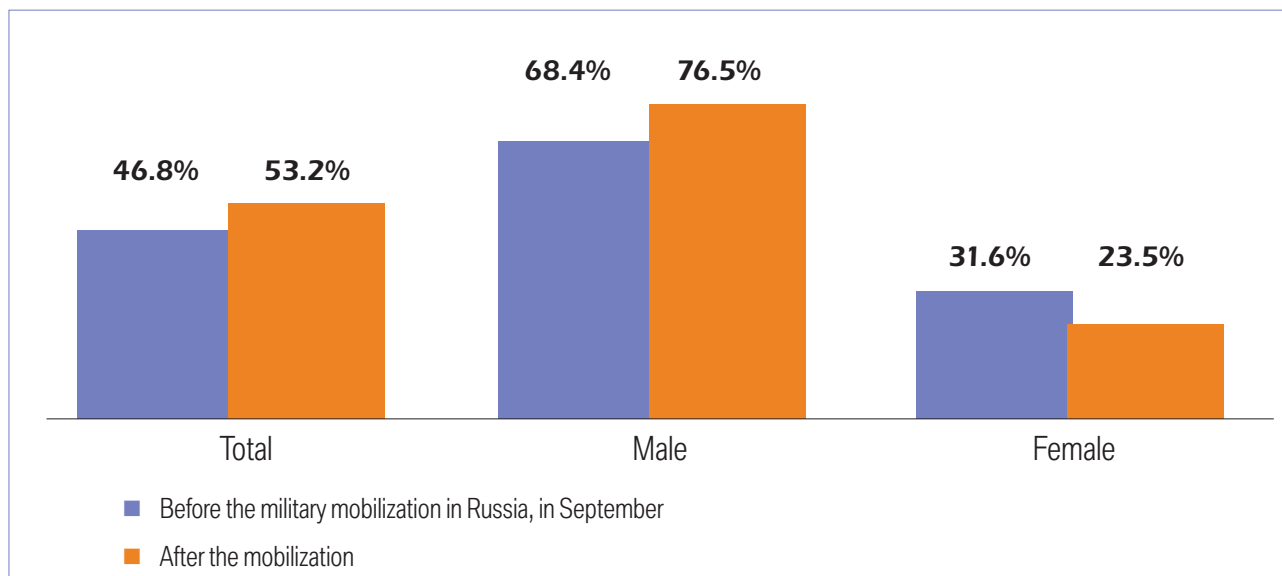


Furthermore, it is interesting to note that nearly 46.8% of the surveyed respondents moved to Armenia before the partial military mobilization in Russia, in September, 2022, while, more than half (53.2%) of the respondents arrived in Armenia after the partial mobilization period, which means after September, 2022 (Figure 7).

It was also assumed that there will be a statistically significant difference between the gender of the respondents and the timeframe in which they moved to Armenia (Chi-square=5.265, df=1, p=0.022).¹¹ Specifically, a higher percentage of male respondents arrived in Armenia after the partial mobilization (before mobilization – 68.4%, after mobilization - 76.5%), and conversely, a higher percentage of female respondents reported arriving in Armenia before the mobilization (before mobilization – 31.6%, after mobilization - 23.5%) (Figure 7).

¹¹ Note: To examine potential variations based on gender and age, all key questions were analyzed for significant differences. Only those results that demonstrated significant differences were included in the report, while findings without significant variations were excluded from the analysis.

Figure 7. When did you move to Armenia? (n=645)



Overall, the qualitative data reveals that people from RF, Ukraine, and Belarus moved to Armenia can be categorized into three distinct groups.

The first group consists of individuals who arrived in Armenia shortly after the full-scale war, primarily due to work or political views. Many of them were either employed by the US or EU-based companies or provided services to foreign clients. Consequently, they had to relocate to Armenia to continue their work. Due to the prolonged nature of the war, they made the decision to remain in Armenia.

The second group comprises the families of these individuals who also migrated to Armenia in order to reunite with their family member.

The third wave of migration occurred after the partial mobilization in RF. People sought refuge in Armenia to avoid conscription. However, as mentioned by some key informants, a portion of these individuals chose to stay in Armenia, while others temporarily stayed until the mobilization period was over, intending to return to RF thereafter.

It is also interesting to note that according to key informants, the first group of people moved to Armenia were more prepared, were already employed and did not have any financial problems. They were relocated by their companies and thus, they did not have any expectations in terms of support from the state or non-state actors. While those who moved after the mobilization, came to Armenia spontaneously, ill prepared and sometimes with no financial resources to live. These people were actively seeking job since the first days of arrival to Armenia. Also, compared to people from the first flow, who are highly qualified

professionals and do not have employment problems, this flow faced difficulties in terms of finding other jobs due to lack of professional skills that would enable them to find work immediately in other country or remotely. As a result, their living standards dropped and sometimes they were forced to accept any job they may find.

“As for the 1st wave, their income, even by the standards of Russia, is above average, the so-called representatives of the upper and middle class.”

(Key informant working with migrants/displaced people)

“Within the framework of the first wave, companies especially the ones whose clients were located in western countries, were relocating their employees. Their problems were mainly related to logistics and much less to financial opportunities and income. And as for people who moved after September, they were looking for work since the day they arrived. They were less prepared to relocation.”

(Key informant working with migrants/displaced people)

“This is forced emigration, many of them do not have remote work, savings, professional skills that allow them to find work and claim the same income in another country, in particular in Armenia. Many of them are abroad for the first time, they do not have a passport, and some of them even flew by plane for the first time.”

(Key informant working with migrants/displaced people)

As for the further details of the profile of people who moved to Armenia, the qualitative data again supported the findings derived from the quantitative data. Specifically, the KIs revealed that a significant portion of individuals who migrated to Armenia fall within the age range of 18-34, with males constituting the majority. Interestingly, a similar trend was observed in the previous assessment.

Regarding their place of residence, once again, the majority of respondents are concentrated in Yerevan and nearby settlements such as Ejmiatsin, Ashtarak and Abovyan. However, some of them also reside in Gyumri, Vanadzor, and Dilijan.

As for the Ukrainians who arrived in Armenia, their number is rather small compared to Russian citizens. They are mainly ethnic Armenians who fled the war and stay with their friends or relatives in Armenia. They consider Armenia as a place for temporary residence. As one of the key informants who works with Ukrainians in Armenia noted, these people take on any job they encounter.

“They consider Armenia as a place of temporary residence, they take any job, among them I can mention a man who had a big business in Ukraine, now works part-time as a taxi driver. People are trying to do something here, at least temporary work, so as not to be at a loose end.”
(Key informant working with migrants/displaced people)

Employment status: According to the survey results, the majority of respondents (85.7%) are currently employed. Specifically, 24.3% of respondents work for a non-Armenian company that is not registered in Armenia, while 23.1% work for a non-Armenian company that is registered in Armenia, 16.7% work for an Armenian company, 15.3% are self-employed, and 6.2% own a business.

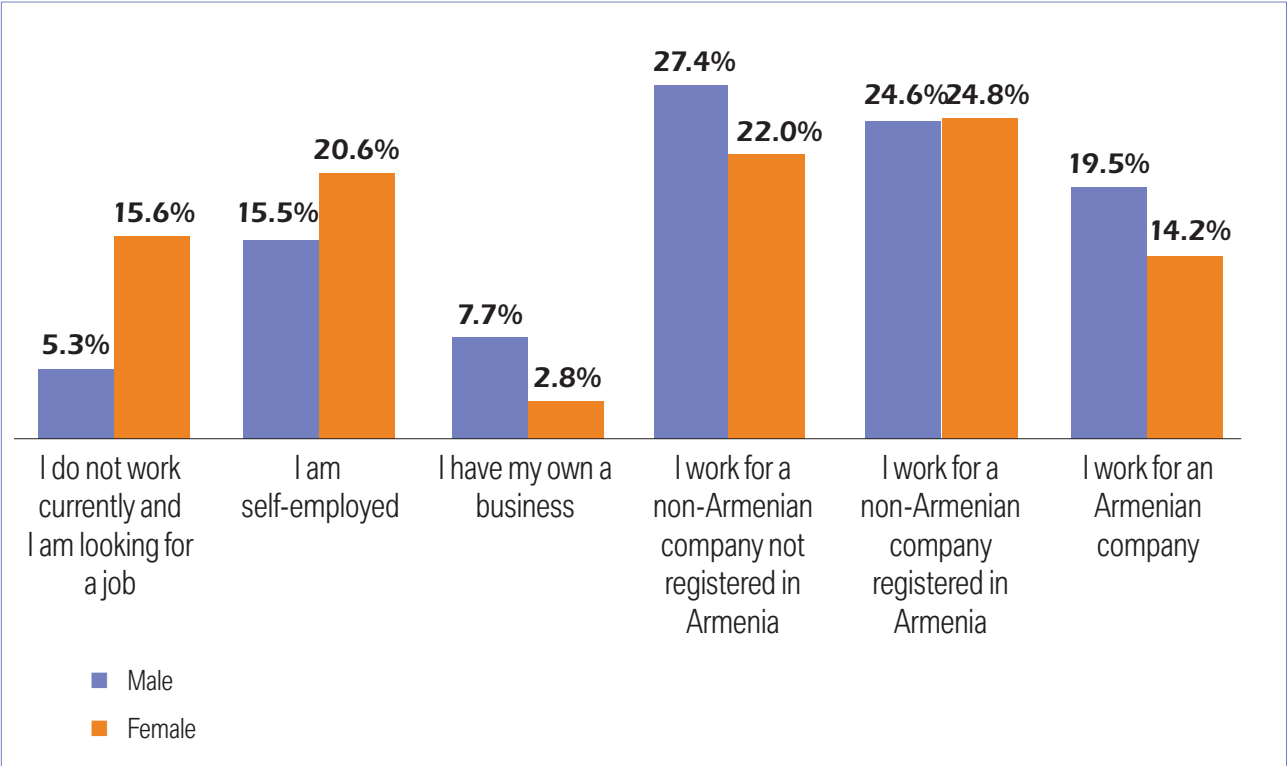
On the other hand, 9.6% of the surveyed respondents are currently unemployed. Among the unemployed respondents, 6.4% are actively looking for a job, while 2.2% are not seeking employment at the moment (Figure 8).

Figure 8. Employment status of surveyed respondents (n=645)



The analysis revealed significant difference between the respondents' gender and employment status.¹² As depicted in the figure below, male respondents showed higher rates of all types of employment (71.5% vs. 61.0%) and business ownership (7.7% vs. 2.8%) compared to female respondents. On the other hand, female respondents had a higher proportion of self-employment (20.6% vs. 15.5%). Additionally, the percentage of female respondents who do not work was notably higher than that of male respondents, with a difference of 10.3% (15.6% vs. 5.3%) (Figure 9).

Figure 9. Employment status of surveyed respondents per gender (n=593)

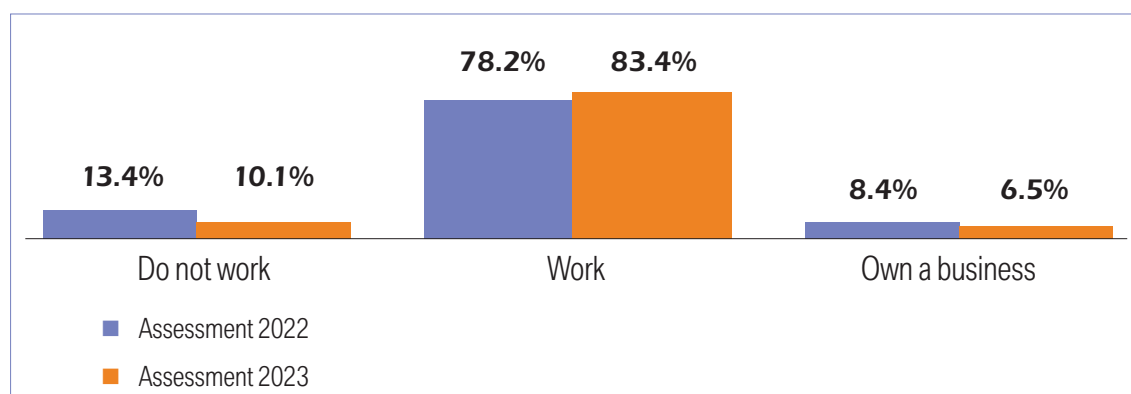


To compare the employment status of the current and previous assessments, the options were combined to create similar categories. This was done because the options slightly differed between the two assessments and combining them allowed for conducting a significance test to demonstrate the differences. The final options included 'do not work,' 'work,' and 'own a business.'

¹² If the p-value is equal to or smaller than 0.05, the results indicate a meaningful and likely non-random relationship or difference between the groups being compared (e.g., males and females). In other words, the probability of obtaining such a difference by chance alone is very small. Conversely, if the p-value is greater than 0.05, it suggests that the observed differences or associations could have occurred by chance. In these cases, we do not have strong evidence to conclude that there is a significant relationship or difference between the groups.

As depicted in the figure below, the percentage of respondents who do not work has experienced a slight decline, dropping from 13.4% in the previous assessment to 10.1% in the current assessment.¹³ Respectively, the share of respondents who are employed has shown an increase from 78.2% to 83.4% when compared to the 2022 assessment (Chi-square=6.315, df=2, p=0.04) (Figure 10). According to the qualitative data, one of possible reasons for this, is that representatives of the 1st wave were more financially self-sufficient, and especially some of the family members of those, who moved to Armenia for work, were not eager to find a job. In contrast, those who arrived in Armenia after the partial mobilization, do face financial constraints and often times are ready for any job available.

Figure 10. Comparison of employment status between assessments of 2022 and 2023



¹³ Considering the options were combined and some options were excluded, such as students or housewives, the total number of respondents has changed and thus, the percentages may vary slightly from the ones presented above in Figure 8.

Employment sector: Regarding the employment sector of the surveyed respondents, the majority of them are employed in the information and communications technology (ICT) sector, accounting for 76.8% of cases, in marketing/PR/advertisement sector (7.3% of cases) and in education sector (6.8% of cases). It is noteworthy that the employment sectors have remained relatively consistent compared to the previous assessment (Table 7).

Table 7. Employment sector of the surveyed respondents

Sectors	Assessment 2023 n=547 ¹⁴			Assessment 2022 n=825 ¹⁵	
	N	% of responses	% of cases	N	%
Information and communications technologies (ICT)	420	66.0	76.8	579	70.2
Marketing/PR/Advertisement	40	6.3	7.3	33	4.0
Education	37	5.8	6.8	46	5.6
Consulting	23	3.6	4.2	23	2.8
Hospitality and customer service (hotel, restaurants, delivery, customer service, etc.)	22	3.5	4.0	27	3.3
Finance, banking	22	3.5	4.0	15	1.8
Healthcare	14	2.2	2.6	4	0.5
Construction	13	2.0	2.4	11	1.3
Culture/Arts/Design	12	1.9	2.2	16	1.9
Retail/Sales	7	1.1	1.3	8	1.0
Science	3	0.5	0.5	-	-
Other	23	3.6	4.2	63	7.6
Total	636	100.0	116.3	825	100.0

According to the qualitative data during the previous assessment and now as well, the majority of people moved to Armenia represent the IT sector. However, there are also people representing sectors such as arts, education, etc. and those who are entrepreneurs. It is worth mentioning that according to the qualitative data, following the second wave of migration, which occurred after the partial mobilization in RF, there was an increase in the number of individuals employed in the hospitality and services sectors. However,

¹⁴ Multiple answer question. In case of multiple answer questions respondents are allowed to choose as many options as apply. In this case 547 respondents were asked the question, but as it was a multiple answer question, the number of responses exceeded the number of respondents and 636 responses were registered (number of respondents is 547, number of answers/cases is 636). That is why the % of cases exceeds 100.

On average, one respondent was employed in 1.2 sectors.

¹⁵ During the previous assessment, the question design was different and the respondents could choose only one answer.

this particular increase was not reflected in the quantitative data. Some key informants also mentioned the mining industry as a sector employing newly arrived people, primarily from RF.

Furthermore, it is worth noting that the Migration and Citizenship Service of RA reports that vast majority of employees possess permanent contracts.

“Relocated people are in general 30-35 years old, whose income is up to \$ 1500-2000 per month on average, they are mainly representatives of 3 key areas: entrepreneurs, IT, creative people (film, theater workers, artists, writers, musicians).”
 (Key informant working with migrants/displaced people)

Family status: According to the results, respondents living alone account for 26.0% of cases. The majority of respondents live with their spouses or partners, which accounts for 61.1% of the cases, with children (21.4% of cases) and other people such as friends and colleagues (8.8% of cases) (Table 8).

Table 8. Who is living with you in Armenia? (n=645)¹⁶

	N	% of responses	% of cases
Spouse/partner	394	48.9	61.1
Child(ren)	138	17.1	21.4
Other people (friends, colleagues)	57	7.1	8.8
Siblings	22	2.7	3.4
Parent(s)/in laws	15	1.9	2.3
Other relatives	6	0.7	0.9
Pets	6	0.7	0.9
No one, I am alone	168	20.8	26.0
Total	806	100.0	124.9

The respondents were also asked about the activity of their spouses/partners in Armenia. The results indicate that in 61.5% of cases the spouse or partner was employed and in 31.8% of cases were taking care of the family members. In only 1.0% of cases, respondents mentioned that their spouse/partner was searching for employment (Table 9).

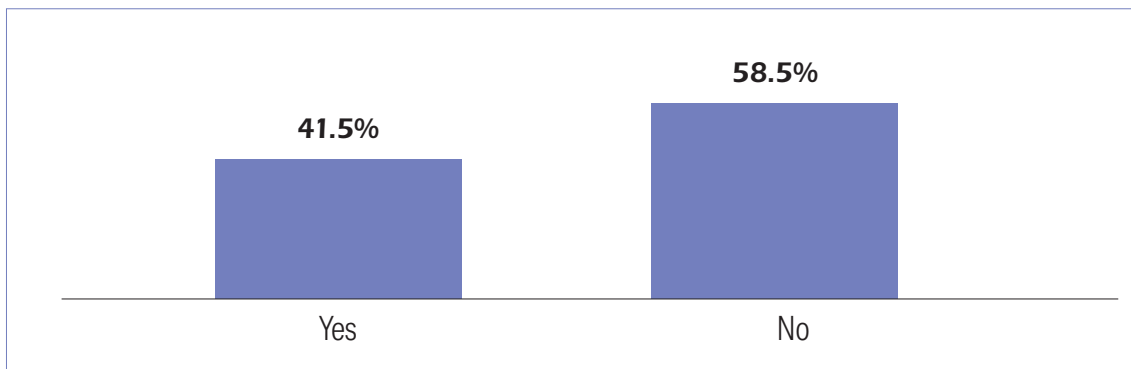
¹⁶ Multiple answer question, on average one person lives with 1.2 other people

Table 9. What is your spouse/partner doing in Armenia? (n=418)¹⁷

	N	% of responses	% of cases
Working	257	57.2	61.5
Taking care of family members	133	29.6	31.8
Studying	31	6.9	7.4
Visiting me temporarily	23	5.1	5.5
Looking for a job	4	0.9	1.0
Other	1	0.2	0.2
Total	449	100.0	107.4

In cases when the spouse/partner was not employed (27% of respondents' spouse/partner was unemployed)¹⁸, respondents were asked whether their spouse/partner was seeking employment. According to the results, 41.5% reported that their spouse/partner is looking for a job (Figure 11).

Figure 11. If your spouse/partner is not working, is she/he looking for a job? (n=41)



¹⁷ Multiple answer question

¹⁸ The question was asked only during in-person and phone survey, among 151 respondents.

4.1.2 Reasons for Leaving Their Home Country and Moving to Armenia

This assessment revealed that the main reasons behind the decision to leave their country of origin and move to Armenia were: war (67.3% of cases), lack of security and safety in the home country (52.2% of cases), work (44.8% of cases) and partial mobilization (39.7%) (Table 10).

Overall, compared to the previous assessment, the reasons have shifted from work as being the main reason to war and security related reasons.

Table 10. Reasons for leaving their home country

Reasons	Assessment 2023 n=645 ¹⁹			Assessment 2022 n=160 ²⁰		
	N	% of responses	% of cases	N	% of responses	% of cases
War	434	31.8	67.3	67	26.6	41.9
Lack of security and safety in the home country	337	24.7	52.2	35	13.9	21.9
Work	289	21.2	44.8	131	52.0	81.9
Partial mobilization	256	18.8	39.7	-	-	-
Education	11	0.8	1.7	-	-	-
Other	24	1.8	3.7	-	-	-
Difficult to answer	13	1.0	2.0	-	-	-
Total	1,364	100.0	211.5	252	100.0	157.5

The table below presents the top three reasons for respondents who moved to Armenia before the partial mobilization, including war (65.2% of cases), work (58.3% of cases), and the lack of security and safety in their home country (45.7% of cases).

However, for individuals who moved to Armenia after the partial mobilization, the reasons slightly differ. The top three reasons for this group include also war-related factors such as the war itself (69.1% of cases), partial mobilization (63.3% of cases), and the lack of security in their home country (58.0% of cases). In contrast, work opportunities were mentioned less frequently (32.9% of cases) among this group (Table 11).

¹⁹ Multiple answer question, respondents were allowed to choose as many options as apply. Thus, on average, one respondent mentioned 2.1 reasons for moving to Armenia.

²⁰ The other options during the previous assessment were different and were mentioned by only a small number of respondents, thus, they were not included here.

These findings suggest that while war-related factors and concerns about security remain significant reasons for leaving their home country both before and after the partial mobilization, the prominence of work opportunities as a motivating factor appears to have decreased for those who moved to Armenia after the partial mobilization.

Table 11. Reasons for moving to Armenia per time period of migration

	Respondents moved to Armenia before military mobilization (n=302)		Respondents moved to Armenia after military mobilization (n=343)	
	N	% of cases	N	% of cases
War	197	65.2	237	69.1
Work	176	58.3	113	32.9
Lack of security and safety in the home country	138	45.7	199	58.0
Mobilization	39	12.9	217	63.3
Education	5	1.7	6	1.7
Other	10	3.3	14	4.1
Difficult to answer	6	2.0	7	2.0
Total	571	189.1	793	231.2

The qualitative data also aimed at exploring the underlying reasons behind why these people have chosen Armenia as their preferred destination for migration.

According to the insights gathered from KIs, Armenia was/is attractive for these people for several compelling reasons.

First, Russian citizens do not require an international passport for travel, coupled with the availability of direct flights between RF and RA. This streamlined travel process makes Armenia easily accessible and reduces logistical barriers.

Second, the presence of Russian-speaking individuals within the Armenian population, particularly among the older generation, serves as a significant advantage. This linguistic familiarity enables Russian citizens to easily communicate in Russian.

The third reason highlighted by key informants is the absence of negative attitudes or discriminatory behavior towards the study population from Armenians. Interestingly, some key informants emphasized that these people feel a strong sense of belonging in Armenia and do not perceive themselves as strangers.

Additionally, the availability of banking services and the acceptance of Russian “Mir” credit cards by Armenian financial institutions provide a smooth experience for Russian citizens. The ability to conduct transfers and transactions through Armenian banks, coupled with the acceptance of their credit cards, further contributes to the convenience and adaptability of living in Armenia.

“Armenia is the only country where we do not feel like refugees’ - this is noted by all those who have moved to Armenia with whom I communicate, and in fact is the main and first key factor, the main reason for moving to Armenia.”
(Key informant working with migrants/displaced people)

“Infrastructure played an important role, in particular, direct flights from Russia to Yerevan, “Mir” cards valid in Armenia, the possibility of entering the country with an internal passport, and the Russian-speaking population of Armenia. This complex of reasons makes Armenia very attractive for moving.”
(Key informant working with migrants/displaced people)

“As reasons, the majority notes that a visa is not needed to enter the country, rather comfortable conditions for legalization, the possibility of a long stay, the use of an internal passport.”
(Key informant working with migrants/displaced people)

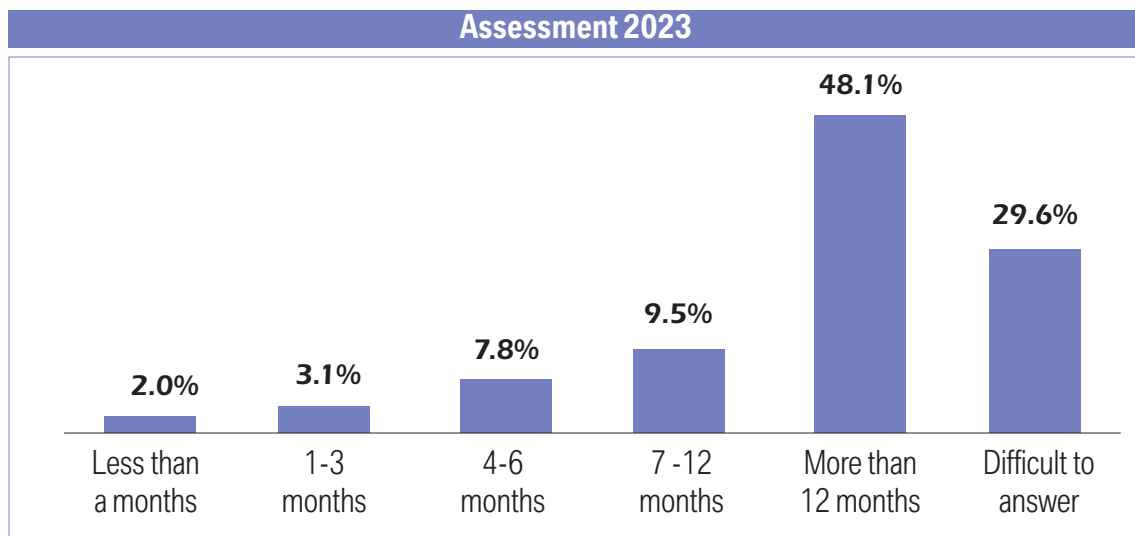
4.1.3 Intentions and Plans of Study Population to Stay in Armenia

The assessment also aimed at capturing the plans and intentions of the surveyed individuals. According to the data, nearly half of the respondents (48.1%) expressed their intention to stay in Armenia for a year or more, while approximately 30% remained uncertain about their plans (Figure 12).

Comparing the data regarding the plans of study population between this assessment and the previous one conducted in 2022 is particularly interesting (Figures 12 and 13). The disparity in intentions concerning staying in Armenia between the two time periods is statistically significant (Chi-square=215.403, df=4, $p<0.01$).²¹ As depicted in the figures below, the proportion of respondents who expressed uncertainty about their plans regarding staying in Armenia increased from 6.3% to 29.6%. Additionally, the percentages of individuals considering shorter stays in Armenia decreased compared to the previous assessment in 2022.

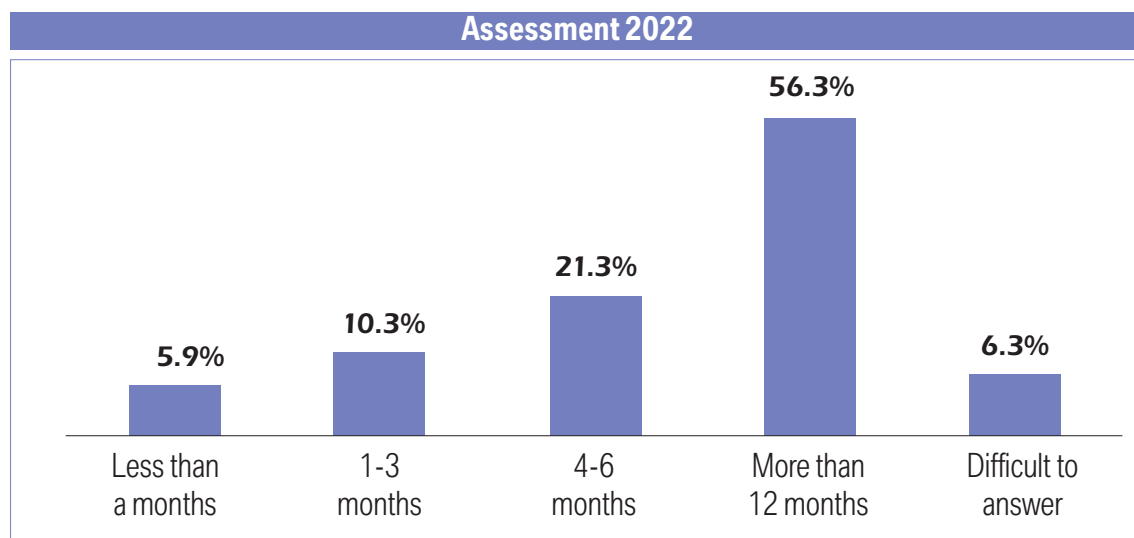
These changes can be attributed to the evolving circumstances surrounding the ongoing conflict. During the initial assessment, people may have perceived the war as a short-term situation, leading more individuals to contemplate shorter stays in Armenia. However, as the conflict has persisted, an increasing number of people have made plans to stay in Armenia for a longer duration, while a significant portion remains uncertain about their plans.

Figure 12. How long do you plan to stay in Armenia? (n=645)



²¹ In order to conduct the statistical test, slight changes were made to the options for this assessment to align them with the previous assessment. Specifically, the options “7-12 months” and “more than 12 months” were combined into a single option called “more than 6 months.” This adjustment allows for a more consistent comparison between the two assessments.

Figure 13. How long do you plan to stay in Armenia? (n=935)



It is worth noting that, according to qualitative data, many people from the mentioned countries initially arrived in Armenia without a clear understanding of their plans. Over time, it became apparent that some of them, particularly those with the means to do so, chose to move to countries such as Georgia, Cyprus, Portugal, Spain, Israel, or other destinations. On the other hand, some also decided to return to their home countries.

Meantime, many informants believed that a significant portion of these people will stay in Armenia, while only a small portion will leave the country. A key informant working at a school for Russian children reported that based on school's statistics, approximately 30% of families (children at school) who come to Armenia end up leaving within a few months to a year and the rest stay. This trend is further supported by data from the Migration and Citizenship Service of RA. According to their records, a substantial 63.3% of Russian citizens who obtained a residence permit after the onset of the war have applied for an extension of their permit.

“They came to Armenia without clearly understanding what they will do next. After some time, we felt that the people who had the opportunity, moved to Cyprus, Portugal, Spain or other countries. Of course, not all, but a part moved to other countries, and a part returned back to Russia.”

(Key informant working with migrants/displaced people)

“According to the statistics of our school, about 30% of those who came to Armenia leave here after living here for several months, that is, up to a year. Of the 175 children registered in our school this year, 50 children will not study in the future because they leave the country, i.e., 1/3.”

(Key informant working with migrants/displaced people)

“In my opinion, 85% of those who have moved have already settled here and I think they will continue to live here.”

(Key informant working with migrants/displaced people)

Another key informant, who provides consulting services to relocated people and companies, observed that around half of them leave the country after several months. At the same time, they estimate that about 20% of this group will stay in Armenia for at least 5 years.

The key informants also provided insights into the reasons why people choose to depart from Armenia. Overall, the decision to leave Armenia appears to be influenced by a combination of factors which include limited opportunities or aspirations within Armenia, the attraction of better prospects elsewhere, and concerns over the geopolitical situation and the potential for regional conflicts.

“One of the reasons for leaving is that some of them feel that Armenia is in a rather complicated geopolitical situation, and there are security problems. They move from a country with an uncertain political situation to another country, where there may be a potential state of war.”

(Key informant working with migrants/displaced people)

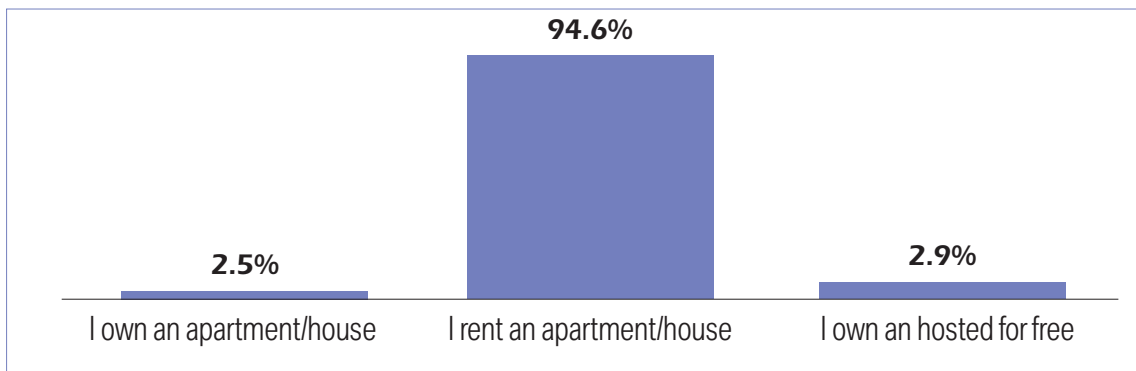
4.1.4 Life in Armenia

The assessment also addressed some specific aspects of lives of the study population, including their access to accommodation, education, and healthcare as well as experiences of discrimination, and the main problems and challenges they encounter in Armenia.

Accommodation

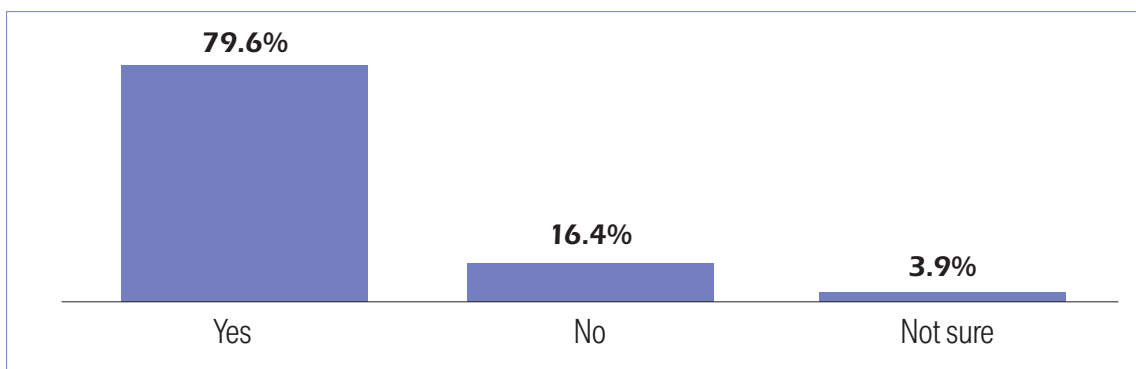
Consistent with the previous assessment, the findings of this assessment also indicated that the majority of respondents (94.6%) reside in rented apartments or houses in Armenia. Additionally, 2.9% of respondents reported being hosted for free in a friend's or relative's apartment or house, while 2.5% mentioned living in their own apartment or house in Armenia (Figure 14).

Figure 14. How is your housing situation in Armenia? (n=645)



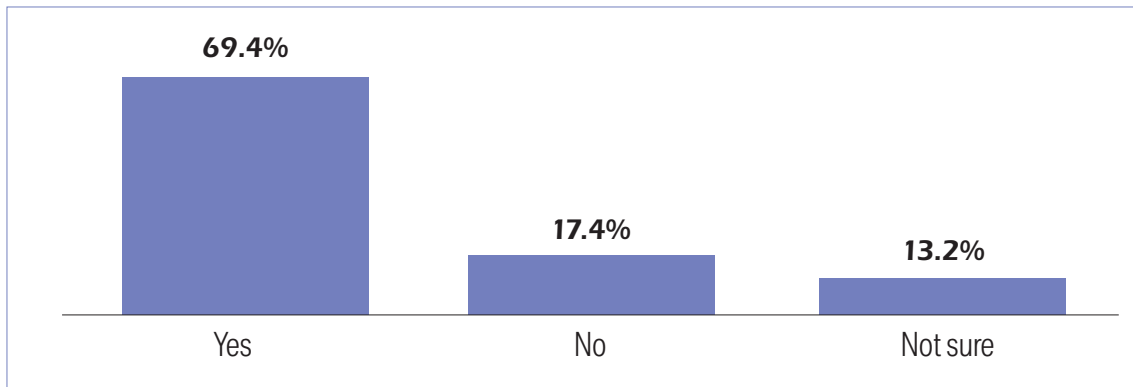
Respondents who mentioned that they rent an apartment/house, were also asked about having a signed rental agreement, with the majority of them having a signed rental agreement (79.6%), while 16.4% do not have and 3.9% were uncertain in this regard (Figure 15).

Figure 15. If renting, do you have a signed rental agreement? (n=608)



As depicted in the figure below, the majority of respondents (69.4%) expressed confidence in their ability to remain in their current rented accommodation for as long as they intend to stay in Armenia. Conversely, 17.4% indicated that they would not be able to continue residing in their present accommodation, while 13.2% were unsure about their future housing situation (Figure 16). It is worth noting that these figures remained relatively stable compared to the assessment conducted in May, 2022, where 66.9% reported being able to stay in their accommodation, 14.4% were unable to do so, and 18.8% remained uncertain.

Figure 16. Do you think you will be able to stay in the present accommodation as long as you plan to stay in Armenia? (n=144)²²



Among the reasons cited for being unable to continue residing in their current accommodation, respondents primarily mentioned high rental costs (38.6%) and uncomfortable housing conditions (22.7%) (Table 12).

Table 12. Reasons for not being able to stay in their present accommodation (n=44)²³

	N	%
High rental costs	17	38.6
Uncomfortable housing conditions	10	22.7
No or end of rental agreement	4	9.1
Plan to buy their own apartment/house	3	6.8
Plan to move to another city (Yerevan)	3	6.8
Other	5	11.4
Difficult to answer	2	4.5
Total	44	100.0

²² The question was only asked during in-person and phone survey, among 151 respondents.

²³ The question was only asked during in-person and phone survey, among 151 respondents.

According to key informants, it was also confirmed that migrants and displaced people primarily rent their accommodation. As one of them also noted, some have bought accommodation in Yerevan because it was an easy way to spend the money, rather than store it in the bank. However, due to increased prices in the real estate sector obtaining an accommodation is not a common practice any more.

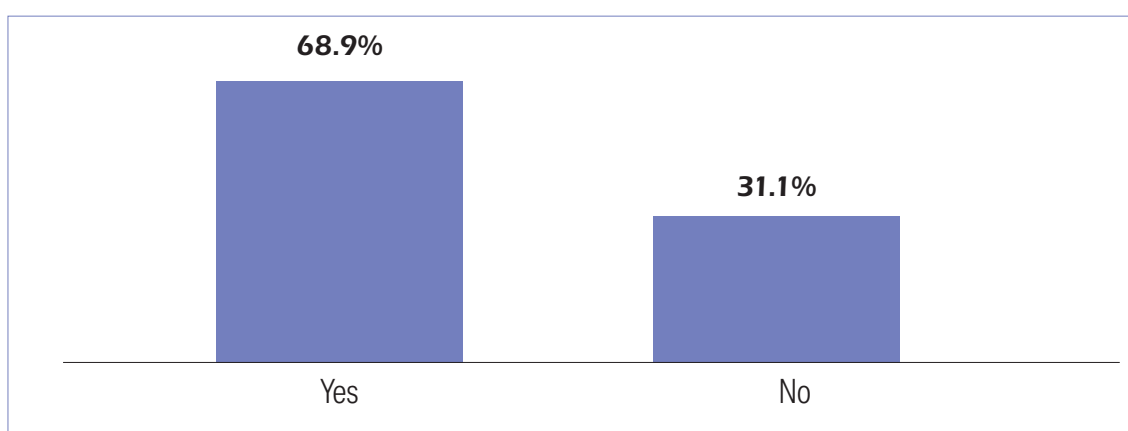
“The vast majority of them rent a house, some of them bought a house when it was possible to do it for 70-100.000 USD and did it in order to invest money in something that was easier than putting it in a bank account.”
(Key informant working with migrants/displaced people)

Access to Education

Out of the total respondents (151 respondents),²⁴ 29.8% (45 respondents) reported having children. Among these respondents, 68.9% (31 respondents) stated that their children attend educational institutions such as universities, schools, or kindergartens in Armenia, while 31.1% (14 respondents) mentioned that their children do not currently attend any educational facility (Figure 17).

The big part of children attends local educational centers (90.3% or children of 28 respondents). From the remaining 3 respondents, one's child(ren) is attending educational center established by Russians moved to Armenia, one's child(ren) to both local and established by Russians, and the other one was uncertain.

Figure 17 . Are your children attending a university/school/kindergarten or any other educational institution in Armenia? (n=45)



²⁴ The questions for this section were only asked only during in-person and phone survey, among 151 respondents.

The most commonly cited reasons for not attending educational facilities included the young age of the child (6 respondents), language barriers (2 respondents), and enrollment in online classes offered by educational institutions in other countries (2 respondents).

Additionally, the data indicates that the majority (10 out of 14 respondents whose children do not attend any facility) have plans to enroll their children in an educational institution in Armenia. The most frequently mentioned types of educational facilities for enrollment were kindergartens and schools. However, 2 respondents stated that they do not intend to do so, and 2 were uncertain about their plans in this regard. The main reason is that the child is too young to attend an educational institution.

Apart from formal education, respondents were also asked about non-formal education opportunities for their children. The findings show that 43.2% of respondents mentioned that their children are not enrolled in any non-formal educational activities. As for the rest, in addition to formal education, their children are involved in various cultural activities in 34.1% of cases, sports in 29.5% of cases, and other non-formal educational centers in 29.5% of cases (Table 13).

Additionally, respondents whose children do not participate in any non-formal educational activities, expressed a desire for their children to be enrolled in cultural activities (arts, music, dancing, etc.) (53.3% of cases), and in sports activities (33.3% of cases) (Table 14).

Table 13. Are your children enrolled in any of the following activities? (n=44)²⁵

	N	% of responses	% of cases
Cultural activities	15	25.0	34.1
Sports	13	21.7	29.5
Non-formal educational activities/centers	13	21.7	29.5
Not enrolled	19	31.7	43.2
Total	60	100.0	136.4

²⁵ Multiple answer question

Table 14. If not, which of the following activities you would like your children to be enrolled in? (n=15)²⁶

	N	% of responses	% of cases
Cultural activities	8	44.4	53.3
Sports	5	27.8	33.3
Non-formal educational activities/centers	3	16.7	20.0
Other extracurricular activities	1	5.6	6.7
Difficult to answer	1	5.6	6.7
Total	18	100.0	120.0

Overall, as key informants highlighted, children from these families seem to have sufficient education opportunities in Armenia. The presence of schools with Russian classes, Russian school opened by the Russian migrants, and the availability of private schools offering education in foreign languages indicate options for parents to ensure their children’s education. However, some of the key informants also highlighted the increased need for more Russian classes or schools.

“Another is education, Russian classes are opening very slowly in local private schools, because they think that those who have arrived will leave soon. In response to this, relocated people open their own schools, 3 Russian schools are already operating, but this is not enough.”

(Key informant working with migrants/displaced people)

Meantime, some concerns were mentioned regarding the lack of sufficient extracurricular activities for teenagers. They highlighted the lack of resources or programs catered to the specific needs and interests of teenagers.

Another challenge mentioned was the availability of places in both preschools and primary schools. The limited spots in preschools could result in difficulties for migrant families in general in securing early education opportunities for their children. However, it should be noted that this is also a problem for the local population; the child should be registered in a kindergarten in advance.

“There are difficulties, in particular, the lack of places for primary school children, as well as preschool children, since places in kindergartens are limited.”

(Key informant working with migrants/displaced people)

²⁶ Multiple answer question

Access to Healthcare

With regard to healthcare, 66.2% of the respondents²⁷ reported that either they or their family members have sought healthcare services in Armenia, while 33.8% have not (Figure 18). Among those who have applied for healthcare services, 86.0% stated that they experienced no difficulties in accessing these services in Armenia, while 14.0% reporting experiencing some issues (Figure 19). These issues included concerns about the low quality of medical services (mentioned in 6 cases), high prices of medical services (mentioned in 5 cases), difficulties with documentation (mentioned in 3 cases), and overcrowding in medical facilities (mentioned in 1 case).

Figure 18. Did you or your family living with apply for health care services while in Armenia? (n=151)

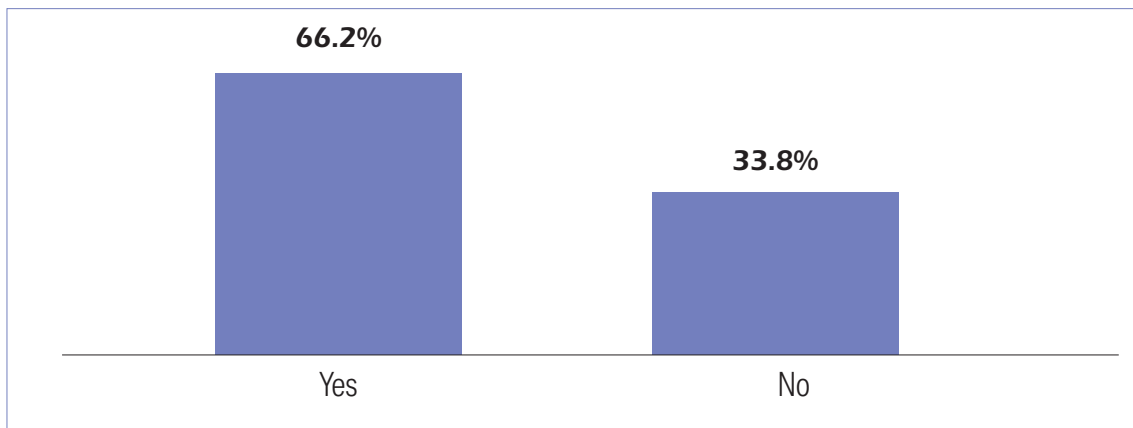
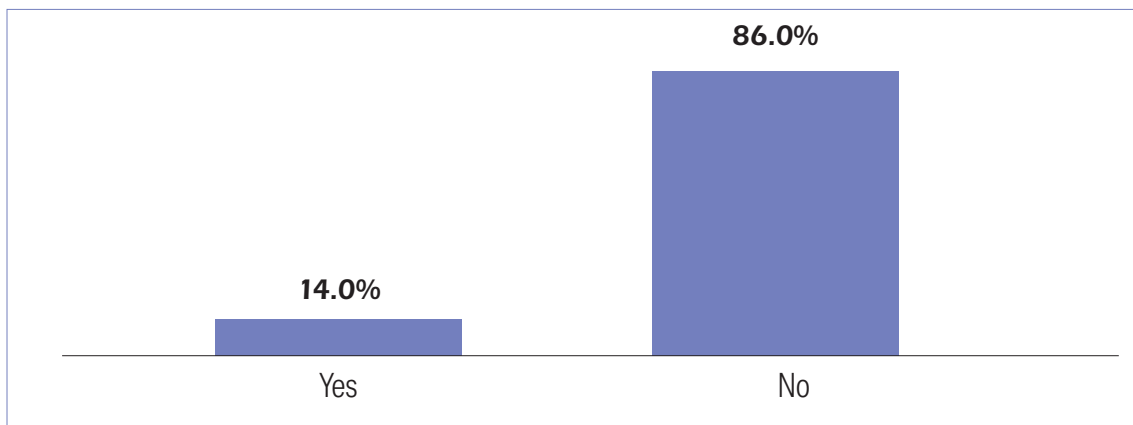


Figure 19. Have you or your family experienced issues in accessing health care in Armenia? (n=100)



²⁷ The questions for this section were only asked during in-person and phone surveys, among 151 respondents.

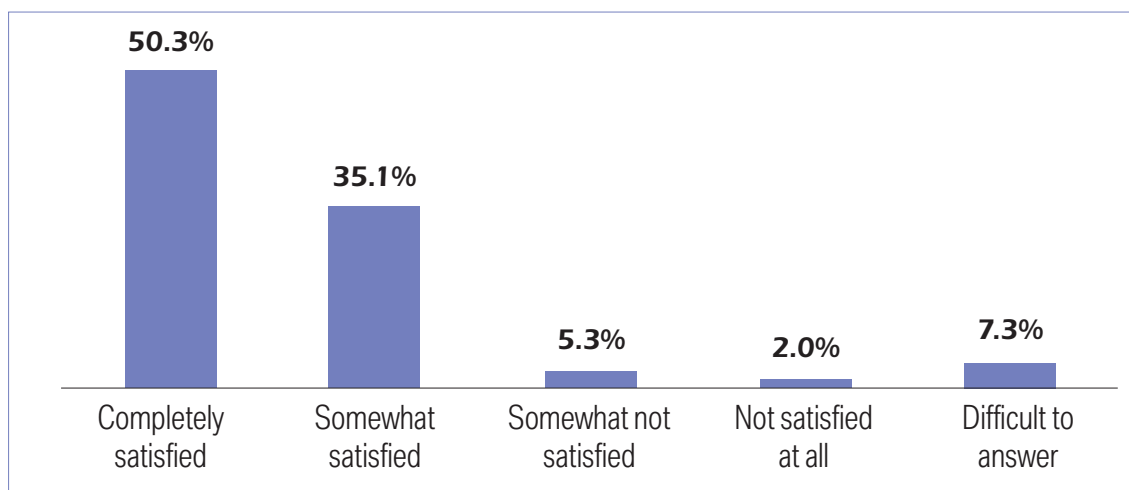
The qualitative data also revealed a positive outlook regarding healthcare experiences among the study population in Armenia. No major problems or concerns related to healthcare services were reported. Key informants consistently emphasized that healthcare services are readily available and accessible to foreign citizens.

“I have never heard anyone here complain about healthcare, definitely no worse than in Russia, even better, especially if it is in the private sector.”
(Key informant working with migrants/displaced people)

Cultural Life in Armenia

The assessment also explored the perspectives of respondents regarding the cultural life in Armenia. The results revealed that the majority of respondents expressed satisfaction with the cultural opportunities in Armenia (concerts, cinema, theater, other cultural events). Specifically, 50.3% reported being completely satisfied, while 35.1% indicated being somewhat satisfied. A small percentage of respondents (5.3%) expressed being somewhat unsatisfied, and an even smaller percentage (2.0%) reported being not satisfied at all, the remaining 7.3% of respondents were uncertain (Figure 20).²⁸

Figure 20. How satisfied are you with the opportunities of cultural life in Armenia? (n=151)



Based on the qualitative data, it is evident that people who moved to Armenia often establish their own community and engage in specific events and places. This behavior was explained by a few experts with the fact that they find comfort and familiarity within

²⁸ The questions for this section were only asked during in-person and phone surveys, among 151 respondents.

their own community during the initial period of adjusting to a new country. However, the informants anticipate that this dynamic will eventually change, leading to increased integration within Armenian society.

Key informants, who moved to Armenia from RF, express overall satisfaction with the cultural life in the country, highlighting the presence of diverse cultural activities. They mentioned the existence of social media pages and groups created by Russian migrants, which serve as platforms for sharing information about cultural events and entertainment opportunities in Armenia.

“In general, I think that the cultural life in Armenia is extensive and very active. There are a lot of places to go and I’m super comfortable here right now. Through the Telegram channel, we learn about all the news about culture and cultural events.”

(Key informant working with migrants/displaced people)

Furthermore, some informants observed that the influx of people from RF has contributed to an expansion of cultural activities, such as concerts, events, and lectures, in Yerevan. Notably, popular figures from the Russian art and culture scene have visited Armenia, with many of these events organized by Russian migrants and attended primarily by them, rather than the local residents.

“There are big changes in social and cultural life of Yerevan. Even from the posters in the streets you can understand what has changed in Yerevan. Now many prominent people visit Yerevan, there has never been such an abundance of cultural events.”

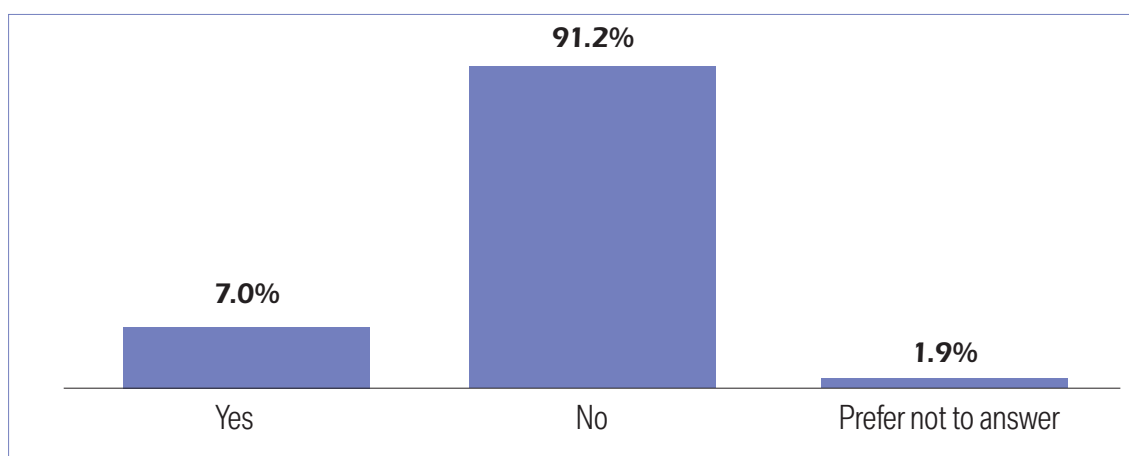
(Key informant working with migrants/displaced people)

Discrimination and Well-being

The respondents were also asked about experiencing antipathy, discrimination or hostile behavior for being a foreigner in Armenia. The results reveal that the overwhelming majority (91.2%) reported not experiencing such incidents, while 7.0% (45 respondents) indicated having experienced the aforementioned negative behaviors (Figure 21).

These figures demonstrate a relatively consistent pattern compared to the previous assessment, where 95.6% reported not experiencing discrimination, while 4.4% did encounter such instances.

Figure 21. Have you or your family ever been victim of antipathy, discrimination or hostile behavior for being a foreigner in Armenia? (n=645)



The majority of respondents who reported experiencing negative incidents stated that they encountered verbal abuse (75.6% of cases) and discrimination (46.7% of cases) during their time in Armenia (Table 15).

Table 15. Types of antipathy, discrimination or hostile behavior experienced in Armenia (n=45)²⁹

	N	% of responses	% of cases
Verbal abuse	34	54.0	75.6
Discrimination	21	33.3	46.7
Physical violence incidents and threats	4	6.3	8.9
Other	4	6.3	8.9
Total	63	100.0	140.0

Overall, more than half of the respondents (52.3%) reported that neither they nor their family members experienced any of the issues mentioned below in Table 16.³⁰ However, a considerable number of respondents mentioned feeling stressed/anxious (34.4% of cases) and experiencing feelings of depression and/or loneliness (25.2% of cases) (Table 16). When comparing the current assessment to the one conducted in June 2022, the pattern remains quite similar in this regard.

²⁹ Multiple answer question, on average respondents mentioned 1.4 types of antipathy, discrimination or hostile behavior.

³⁰ The question was only asked during in-person and phone surveys, among 151 respondents.

Table 16. Since arriving to Armenia have you or your family members been bothered by the following issues? (n=151)

	N	% of responses	% of cases
I have no issues	79	41.6	52.3
Feeling stressed/anxious (insomnia, trouble breathing, nausea, pounding heart)	52	27.4	34.4
Feeling depressed and/or lonely	38	20.0	25.2
Feeling angry	12	6.3	7.9
Using alcohol or drugs	7	3.7	4.6
Other	1	0.5	0.7
Prefer not to answer	1	0.5	0.7
Total	190	100.0	125.8

Additionally, 19.0% of respondents mentioned receiving professional support, while 81.0% did not. Furthermore, among those who had not received any support, 19.4% reported a need for professional support, while 80.6% stated that they did not require such assistance.

Key informants did not observe/hear of a significant number of discrimination incidences against the arrived population.

4.1.5 Resources and Services Needed to Better Organize Their Lives in Armenia

The respondents were asked about the resources and services that could contribute to better organizing their lives in Armenia. The data revealed several prominent mentions, with the following resources and services standing out: language classes (55.9% of cases), counseling regarding the required documents for legal residence and the associated procedures in Armenia (50.6% of cases), accessible information on all available services (50.0% of cases), and assistance with opening a bank account (40.1% of cases) (Table 17).

It is also interesting to note that out of the 645 respondents, only 29 individuals mentioned not requiring any support or services, expressing that everything is satisfactory for them in Armenia.

Table 17. What resources or services would be most helpful to better organize your lives in Armenia? (n=644)³¹

Resources and services	N	% of responses	% of cases
Language classes	360	19.1	55.9
Counselling on the necessary documents for legal residence and the procedure for obtaining them in Armenia	326	17.3	50.6
Accessible information on all available services	322	17.1	50.0
Assistance to open a bank account	258	13.7	40.1
Legal assistance	195	10.4	30.3
Assistance with job placement	115	6.1	17.9
Assistance to register a company	111	5.9	17.2
Assistance with accommodation	83	4.4	12.9
Counselling on work permit	75	4.0	11.6
Other	10	0.5	1.6
Nothing	29	1.5	4.5
Total	1,884	100.0	292.5

According to the qualitative data, many of them have taken the initiative to learn basic Armenian in order to communicate with the local population. They suggested that the Government could consider offering free language courses for these individuals, which would not only facilitate communication but also allow for an assessment of their specific needs.

³¹ Multiple answer question, on average respondents mentioned 2.9 resources and services that could help them better organize their life in Armenia.

“I know, for example, that many people strive to learn at least conversational Armenian, and the state could organize free courses, during which it would better understand the needs of these people and support them in integration process.”

(Key informant working with migrants/displaced people)

Another suggestion put forward by key informants was the establishment of an information support center that would provide support to migrants and displaced people in navigating various services and information. This center could offer guidance on legislative and legal matters pertaining to taxation systems, licensing and certification requirements for different activities, leasing of premises, advertising laws, and more.

Additionally, some informants proposed the creation of a platform that would disseminate information about career opportunities specifically tailored for migrants and displaced people. This platform could help identify sectors where these people may be in demand and provide opportunities for their involvement.

Overall, key informants unanimously emphasized the significant role of social media, particularly Telegram groups and chats, which these people utilize to exchange information and share their experiences with both governmental and non-governmental entities. These online communities also serve as platforms for offering advice and support to one another in dealing with the specific challenges they face in Armenia.

“They have a developed network, they exchange information with each other, they write in chat that such a problem arises in this place, how it should be solved, they discuss reliable service providers: accountant, legal, etc., who is worth working with, with whom no. Word of mouth works very well for them.”

(Quote from KII / state representative)

“The vast majority of Russians use Messenger, Telegram chats and channels as a platform for receiving and transmitting information, they also use Instagram, posting advertisements around the city, the so-called illegal outdoor advertising.”

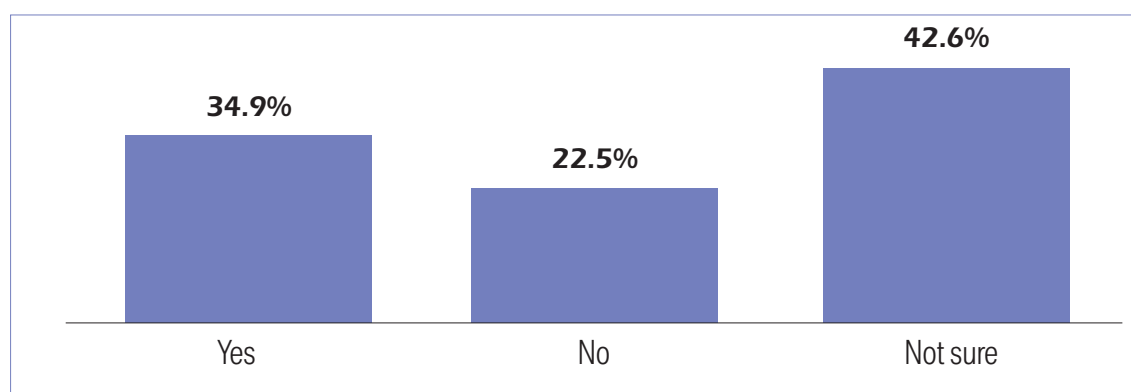
(Key informant working with migrants/displaced people)

4.1.6 Financial Support/grant as an Incentive to Set Up a Start-up/business in Armenia

The assessment also delved into the readiness and willingness of respondents to establish a start-up or business in Armenia if provided with financial support or grants. Overall, the findings demonstrate a mixed response regarding the potential motivation and interest among the arrived population to engage in entrepreneurial endeavors with financial assistance. The data revealed that 34.9% of respondents reported that financial support or a grant could serve as an incentive for them to initiate a start-up or business in Armenia. However, a significant portion of respondents, comprising 42.6%, expressed uncertainty regarding their inclination in this matter, while 22.5% of respondents indicated no desire to establish a start-up or business in Armenia (Figure 22).

Furthermore, respondents were asked about the amount of financial support or grant that would be necessary for them to establish their start-up or business in Armenia. These figures provide insights into the financial expectations and aspirations of these people when it comes to launching their own start-ups or businesses in Armenia. The data revealed that, on average, respondents mentioned a figure of 33,000 USD as the required amount. Additionally, when asked about the amount they were willing to invest in their start-up or business, respondents, on average, mentioned a sum of 12,500 USD.

Figure 22. Can financial support/grant be an incentive for you to set up a start-up/business in Armenia? (n=645)



Based on the qualitative data, it is evident that many people have already established businesses in Armenia, particularly within the hospitality and service sectors. Some informants believed that support for establishing start-ups or businesses in sectors that require fewer resources, such as hospitality and service, might be of interest to migrants and displaced people. However, there was an opinion that small start-ups or businesses might face challenges in attracting investments, whereas larger projects, particularly in the

educational sector, might have more opportunities for financing. It is worth noting that due to the uncertain future faced by many migrants and displaced people, they might be hesitant to make long-term investments in more substantial ventures.

Additionally, the informants suggested that seeking professional assistance, such as competent accountants and lawyers, could contribute to the success of starting a business. They also noted that compared to RF, bureaucracy is not a significant issue in Armenia.

“In my opinion, most of them are not ready to make serious investments now because of the uncertainty, but some of them are doing it in lighter areas that are related to their requirements and do not imply the need for serious investment.”

(Key informant working with migrants/displaced people)

“I think that in order to start a startup or business, you need the support of dedicated professionals: if there is a cool base of lawyers and financiers, this will not be difficult to do.”

(Key informant working with migrants/displaced people)

4.1.7 Challenges Faced by Study Population and Their Families

Individuals who participated in the survey were also asked about the top challenges they or their family members encountered in Armenia. The results indicate that the most frequently mentioned problems or challenges were high accommodation renting prices and quality of accommodation (35.9% of cases), quality of transport, traffic, and risky driving of drivers (20.5% of cases), concerns regarding ecology, poor urban environment, city and air pollution (18.9% of cases), issues related to the quality of infrastructures such as roads, electricity and water cuts (18.5% of cases), and dissatisfaction with banking services (15.4% of cases) (Table 18). It is also interesting to note that 9.2% have not faced any challenges in Armenia at all.

Table 18. Challenged of migrants and displaced people in Armenia, (n=645)³²

Problems and challenges	N	% of responses	% of cases
High accommodation renting prices and quality of accommodation	231	16.9	35.9
Quality of transport, traffic, risky driving of drivers	132	9.7	20.5
Ecology and urban environment, air pollution	122	9.0	18.9
Quality of infrastructures	119	8.7	18.5
Banking services	99	7.3	15.4
Absence/ accessibility/ quality of services (online)	52	3.8	8.1
High prices	52	3.8	8.1
Stray dogs/cats	49	3.6	7.6
Lack/ absence of information	41	3.0	6.4
Employment/ low salaries	40	2.9	6.2
Problems with obtaining legal status	38	2.8	5.9
Lack of playgrounds, parks, green zones	36	2.6	5.6
Lack of shops, stores, products, goods, equipment	34	2.5	5.3
Language barrier	33	2.4	5.1
Queues, bureaucracy of state agencies	29	2.1	4.5
Accessibility and quality of education (kindergartens, schools)	23	1.7	3.6
Access to healthcare, medicines, quality of healthcare	20	1.5	3.1
Taxes/ lack of information about paying taxes	18	1.3	2.8
Currency instability	17	1.2	2.6

³² Multiple answer question, on average, one respondent mentioned 2.1 problems/challenges faced in Armenia

Political situation/ Karabakh conflict	15	1.1	2.3
Lack of events, entertainment	15	1.1	2.3
Difference in mentality	15	1.1	2.3
Weather conditions	13	1.0	2.0
Uncertainty/ lack of security	11	0.8	1.7
Irresponsibility, lack of punctuality	11	0.8	1.7
Attitude of people	10	0.7	1.6
Large number of smokers	6	0.4	0.9
Difficulties with embassies of other countries	5	0.4	0.8
Other	18	1.3	2.8
No problems	59	4.3	9.2
Total	1,363	100.0	211.6

The table below presents a comparison of the top five problems mentioned by the surveyed individuals in this assessment and the previous one conducted in 2022. It is evident that the priority problems remain the same, although the order has changed. Specifically, dissatisfaction with banking services, which was the second most mentioned problem in the previous assessment, has decreased in frequency during this assessment. This change can be attributed to the fact that most respondents have been in Armenia for over six months, allowing them to resolve any issues with banks and gain a better understanding of the banking system in Armenia, thereby dealing with it more easily than before.

Table 19. Comparison of problems/challenges faced by migrants and displaced people in Armenia of assessments 2023 and 2022

	Assessment 2023			Assessment 2022		
	N	% of responses	% of cases	N	% of responses	% of cases
High accommodation renting prices and quality of accommodation	231	16.9	35.9	370	18.7	43.7
Quality of transport, traffic, driving	132	9.7	20.5	233	11.8	27.5
Ecology and urban environment, air pollution	122	9.0	18.9	150	7.6	17.7
Quality of infrastructures	119	8.7	18.5	102	5.2	12.0
Banking services	99	7.3	15.4	298	15.1	35.2

The qualitative data further supports the existence of the aforementioned problems and challenges.

According to several key informants, these people in Armenia may face challenges related to urban environment, particularly pollution, increased living costs, and high prices in

the real estate market. They highlighted that the prices of real estate have notably risen following the influx of migrants from RF after the partial mobilization.

“Housing continues to be the main problem here, there is no choice and the prices are very high. Recently, we conducted a comparative analysis of rental prices in the countries where relocated people from Russia live and it turned out that Armenia is in the first places in this list.”
(Key informant working with migrants/displaced people)

“The first problem is the rise in prices for everything and not only for housing, the dram has grown against the dollar, ruble, euro, it is now more expensive to live here than in Moscow. At the same time, there is a strong discrepancy between prices and quality.”
(Key informant working with migrants/displaced people)

These informants provided examples of other countries, such as Cyprus, which have successfully implemented relocation projects to attract foreign citizens, including Russian citizens, by offering favorable working and living conditions. They suggested that the GoA should consider adopting similar projects to attract and retain migrants. Furthermore, they recommended that the GoA should incentivize and support companies that choose to operate outside of Yerevan.

Issues with banks were also mentioned by some informants, although they noted that this was more prominent during the initial stages of relocation. Banks often required various documents from foreign citizens to open accounts, as they needed to ensure compliance with sanctions and prevent individuals from using the accounts solely for transactions before returning to RF. Another challenge mentioned is the difficulty in receiving transfers from RF.

“The banks require different types of documents for opening accounts, as they want to be sure that the person will not open an account and go to Russia and make various transactions using that bank account from Russia, due to which the bank may come under sanctions, but a person is really in Armenia, where they lived and spent money.”
(Key informant working with migrants/displaced people)

Additionally, some informants raised concerns about the complexities associated with obtaining residency cards and social security cards in Armenia, citing the requirement for numerous documents and paperwork as a significant obstacle.

“At first, many had a problem with a residence permit, it would be good if this problem would be solved at the airport using a simpler system. There is also a problem with a social card: technically, it seems like it’s not difficult to get it, but in reality, when you start making it, it’s not so easy, it requires a lot of paperwork.”
(Key informant working with migrants/displaced people)

4.1.8 Impact of Study Population on Armenian Society: Positive Changes and Contributions

The assessment not only examined the challenges faced by people from RF, Ukraine, and Belarus but also delved into the changes and contributions they have brought to Armenian society, as revealed by the analysis of the qualitative data.

Overall, regarding the impact of this group of people on Armenian society, key informants consistently highlighted several positive changes. Firstly, the increase in highly qualified professionals among the arrived population has had a particularly positive effect on the IT sector. According to them, this influx of talent will contribute to the growth and development of the industry in the long run.

Additionally, relocated people and companies have made a positive contribution to the state budget through tax payments. This financial contribution further will strengthen the country’s economy.

“Actually, a quality group was moved to Armenia, in terms of education, occupation, behavior and common sense.”
(Key informant working with migrants/displaced people)

Key informants also noted the improvement in the service sector, including delivery services, as a result of the presence of migrants and displaced people. Furthermore, a notable development brought about by some migrants from RF is the establishment of cafes and platforms that not only generate employment opportunities but also serve as workspaces for remote workers. This trend has fostered a supportive environment for individuals engaged in remote work and has contributed to the diversification of the cafe culture in Armenia, introducing new styles and approaches.

“There are many cozy cafes, centers and, accordingly, more jobs, which is also very good. I really like everything here.”
(Key informant working with migrants/displaced people)

“Some of the people who moved to Armenia last year in March have founded local businesses here, and this affects the city and life in general. Some opened vintage clothing stores in the garage, others opened a coffee shop, a bar, and I think each of them brings positive changes to people’s lives, due to this, the city also develops.”
(Key informant working with migrants/displaced people)

4.2 Survey Among Relocated Companies from the Russian Federation and Belarus³³

The following sections present the findings derived from semi-structured interviews conducted with legal entities that either relocated to Armenia or registered in Armenia after the war in Ukraine. The interviews cover various topics including the profile of the companies, their intentions and plans, as well as the main issues and needs they encountered during the process.

4.2.1 Profile of Surveyed Companies

The vast majority of interviewed companies (34 companies out of 40) reported relocating to Armenia from RF, with 1 company coming from Belarus. The remaining respondents mentioned working in international organizations that transferred their employees from RF to RA. The majority of these companies are based in Yerevan. The IT sector dominates, followed by hospitality, healthcare, education, and marketing sectors.

The data indicates that in most cases, employees of these companies come from RF or other countries, with a smaller number of locally hired employees. Additionally, according to the participants, more than half of non-Armenian employees of these companies have relocated with their families or some family members.

Overall, every third company interviewed reported that the number of employees will increase in the coming months. Respondents who anticipated an increase in the number of employees mentioned that the workload has increased and they have already started the process of expanding and opening new positions. At the same time a few companies reported that the number of employees will decrease in the near future. The reasons for that are financial constraints and intentions of staff to relocate to other countries.

³³ The surveyed companies did not include any from Ukraine, which is why the country's name is not included in the title.

4.2.2 Intentions of Companies Relocated to Armenia

Regarding the intentions of the interviewed companies, almost all expressed their plans to remain in Armenia for more than 12 months. The primary reasons cited for this decision are the political and economic situation in RF in general, and sanctions against RF in particular. Additionally, many businesses highlighted the favorable living and working conditions in Armenia, with no significant barriers or obstacles for their operations.

“Our company is American and has several branches. Sanctions are being reconciled in Russia, but not here, so we will continue to operate from Armenia in the near future.” (Company representative)

“It is convenient here for people as many do not experience language-related discomfort. There are skilled specialists available, and everything is excellent.” (Company representative)

Among the participants, only one mentioned their intention to stay in Armenia for less than 3 months, with the purpose of eventually relocating to another country.

The companies were also asked about their intentions to implement social responsibility programs in Armenia. The results show that almost half expressed a positive inclination towards such initiatives. Conversely, a few did not mention any plans in this regard, and more than half remained uncertain.

4.2.3 Resources and Services for Improved Company Operations in Armenia

According to the table below, the participants identified several resources and services that would greatly assist their companies in operating more effectively in Armenia. The most sought-after resources include accessible information on all available services (32.5% of cases), guidance on the necessary documents for legal residence and the procedures to obtain them in Armenia (30.0% of cases), legal assistance (25.0% of cases), counseling on work permits, assistance in opening bank accounts, and language classes (22.5% each).

Table 20. What resources or services would be most helpful to better operating in Armenia? (n=40)³⁴

	N	% of responses	% of cases
Accessible information on all available services	13	14.9	32.5
Counselling on the necessary documents for legal residence and the procedure for obtaining them in Armenia	12	13.8	30.0
Legal assistance	10	11.5	25.0
Counselling on work permit	9	10.3	22.5
Assistance to open a bank account	9	10.3	22.5
Language classes	9	10.3	22.5
Assistance to register a company	4	4.6	10.0
Assistance with accommodation	4	4.6	10.0
Assistance with job placement	2	2.3	5.0
Other	1	1.1	2.5
Nothing	12	13.8	30.0
Difficult to answer	2	2.3	5.0
Total	87	100.0	217.5

Key informants emphasized the importance of small grant projects or subsidies for the companies that moved to Armenia, that would enable those to cover the unexpected costs and expenses related to the move and provide a much-needed boost for the business.

At the same time, it is important to note that the GoA does offer a number of subsidy projects to all business entities registered and operating in Armenia, however none of the interviewed companies were aware of this. For example, the GoA offers subsidies for new equipment acquisition for businesses operating in number of priority sectors, including IT.³⁵ With another state program, the GoA offers reimbursement of certain % of staff employee's salary, if the employee is a graduate of top 400 universities, that include few Russian educational institutions as well.³⁶ However, there is a need for better dissemination of information about these programs to the target group.

³⁴ Multiple answer question

³⁵ Ministry of Economy of Armenia, Economy modernization program, <https://mineconomy.am/media/23365/Economic%20Modernisation%20Program.pdf>

³⁶ Ministry of Economy of Armenia, Highly Qualified Specialist Attraction Program <https://mineconomy.am/media/23366/HQ%20Specialist.pdf>

4.2.4 Issues and Needs of Surveyed Companies in Armenia

According to the interviewed companies, many of them have encountered various issues and obstacles upon arrival in Armenia. The most common issues were related to opening bank accounts, equipment relocation, and financial transactions (Table 21).

The main reasons cited for issues related to opening bank accounts were the lengthy process duration and specific requirements for foreign citizens. Participants mentioned that the overall procedure took longer than expected and involved additional documentation and verification steps for foreign citizens.

As for the equipment relocation, delays in customs procedures both in Armenia and in RF were the primary causes of the issues. Participants highlighted that the customs clearance process was time-consuming and encountered delays, leading to disruptions in equipment relocation.

Issues related to financial transactions were also mentioned, with some participants noting that these challenges resulted in delayed salary payments.

Table 21. What were the main obstacles the company has encountered in Armenia upon arrival? (n=40)³⁷

Issues/obstacles then	N
Bank account issues	7
Equipment relocation issues	6
Financial transaction issues	6
Employee relocation issues	2
Workplace rental issues	2
Other	4
There were no obstacles	14
Difficult to answer	4
Total	45

As for now, more than half of the companies surveyed reported no issues or obstacles. However, few companies still encounter challenges, including internet-related issues, a shortage of qualified staff, and high rental prices for workspace (Table 22).

³⁷ Multiple answer question

In an effort to address these concerns, some companies expressed their intentions to explore more affordable locations and hire employees from RF and other regions. Additionally, a few respondents emphasized their desire to arrange a meeting with government representatives in order to find a solution to the problem of high rental costs.

Table 22. What are the main obstacles the company is encountering in Armenia now? (n=40)³⁸

Issues/obstacles then	N
Connectivity issues (internet)	4
Insufficiency of qualified staff	3
High rental prices for workplace	3
Tax related issues	1
Difficulties in paying salaries	1
Other	3
There are no problems now	23
Difficult to answer	4
Total	42

Out of all the companies interviewed, only one reported receiving any form of governmental assistance in Armenia. In addition, two companies mentioned receiving non-governmental assistance. The assistance provided was primarily related to healthcare support and assistance with the process of registering a legal entity.

Overall, based on insights from Klls as well, relocated or registered companies generally do not encounter significant challenges in Armenia. While there may be some concerns regarding infrastructure, such as road conditions, transportation accessibility, internet connectivity, bureaucracy, and communication with state entities, these issues are not critical to their day-to-day operations.

“They complain about us because we didn’t respond to their application for a long time, but the number of applications is high, the employees of the department are few and we can’t manage to do the work in a proper time.”
 (Quote from Kll / state representative)

However, some of the Klls mentioned the issue regarding the banking system, particularly

³⁸ Multiple answer question

when it comes to opening bank accounts and conducting transfers. As they noted, banks tend to exhibit over-compliance to avoid potential sanctions, leading to certain difficulties in this process.

“Mainly, the problem is with the banking sector: transfers, problems related to opening an account. For example, in the sphere of logistics, banks have a problem of overcompliance, related to sanctions and they sometimes avoid serving people with Russian citizenship.”

(Quote from KII / state representative)

“There are big difficulties in the banking sector: these are transfers, international transactions, with which there are always problems.”

(Key informant working with migrants/displaced people)

5. Conclusion and Recommendations

The assessment focuses on estimating the number of Russian, Ukrainian, and Belarusian citizens residing in Armenia and provides insights into their profile, reasons for migration, plans, life in Armenia, and challenges faced by both individuals and private companies. The findings are based on primary (quantitative and qualitative) and secondary data analysis.

The analysis indicates that the **estimated number of Russian, Ukrainian, and Belarusian citizens temporarily living in Armenia ranges from 53,000 to 58,000, with a significant increase of approximately 20,000 over the past year.** Various indicators, such as the influx and outflux numbers, work permit applications, real estate purchases, and the registration of legal entities, support this trend of increasing migration. The surveyed population consists predominantly of Russian citizens, aged between 18 and 45, with a high level of education. Most of them are employed, particularly in the IT sector, and reside in Yerevan.

The primary reasons for leaving their home countries and moving to Armenia include the war, lack of security and safety in their home country, work opportunities, and partial mobilization. Factors such as easy travel, Russian language proficiency among the local population, absence of negative attitudes, and availability of banking services have influenced their choice of Armenia as a preferred destination. In terms of plans, almost half of the respondents expressed their intention to stay in Armenia for a year or more. However, a notable increase in uncertainty regarding plans was observed compared to the previous assessment.

Overall, respondents do not express major problems in Armenia regarding healthcare, education, cultural opportunities, negative attitude. To better organize their lives in Armenia, the surveyed population expressed a need for language classes, counseling on legal residence documents and procedures, accessible information on available services, and assistance with opening bank accounts. The main challenges faced by respondents and

their families include high accommodation rental prices and accommodation quality, transportation issues and risky driving, concerns about ecology and urban environment, infrastructure problems, and dissatisfaction with banking services. Although the top five challenges remained consistent compared to the previous assessment, the frequency of dissatisfaction with banking services decreased.

Based on the assessment findings, the analysis has identified several areas for intervention, which are presented below as **recommendations**. These proposed interventions address the challenges revealed by the assessment and have the potential to facilitate the effective integration of migrants and displaced individuals into Armenian society.

One of the key gaps identified through both quantitative data analysis and input from key informants is the lack of accessible information about various services that can facilitate the orientation and integration of migrants and displaced people into Armenian society. To address this gap, it is recommended that the GoA and partner organizations **consider possibility of establishment of information support center for migrants and displaced people. This can be either an independent center operating in close collaboration with the GoA and IOM, or a separate function within the RA Migration and Citizenship Service.** The center can offer a range of services, including language classes, legal counseling, job search assistance, professional (re)orientation and training, accommodation support, information on available services and state subsidy programs, support with applying to those, etc. Additionally, it is important to ensure that the counselling and support services are available in multiple languages. Furthermore, social media channels, widely used among migrants and displaced people, can also serve as an effective platform for disseminating the information.

In this context it is also recommended to **empower local authorities and stakeholders through comprehensive capacity building initiatives**, enabling them to deliver appropriate and **inclusive services to migrants and displaced people.**

In addition to the aforementioned recommendations, it is also recommended to **facilitate a comprehensive and in-depth assessment of the services provided to migrants and displaced people by local authorities and stakeholders.** This assessment should be accompanied by a rigorous feasibility study to ensure the effectiveness and suitability of the existing services and identify areas for improvement.

Another finding indicated that over **one third of the respondents expressed interest in initiating a start-up or business in Armenia if they receive financial support or grants.** In light of this finding, it is recommended that the GoA and donor organizations consider the potential and the needs of people from the mentioned countries as a specific

target group for programs aimed at promoting SME development in Armenia.

In addition, it is also recommended that the GoA works towards **developing mechanisms and incentives to encourage SME development outside of Yerevan, specifically among individuals from the mentioned countries.**

The assessment also examined the needs and challenges faced by companies that relocated to Armenia or were registered in Armenia by citizens of Russia and Belarus following the war. While no significant problems were identified for these companies, many of them expressed a need for qualified staff. Key informants emphasized that the influx of highly skilled professionals who have moved to Armenia can be highly advantageous for various sectors. Therefore, it is recommended that the GoA **explore the possibility of establishing partnership platforms to facilitate stronger professional collaborations and enhance human resource management between local companies and those that have moved to Armenia.**

Fostering inclusive societal integration between migrants, displaced people, and host communities is important for promoting social cohesion and harmony, for creating opportunities for cultural exchange and enrichment, having positive economic impacts, etc. Thus, the GoA and local communities could **promote the development of interventions that effectively address and enhance the interactions between migrants and displaced people and host community, fostering inclusive societal integration.** These could include community engagement projects, or initiatives promoting economic integration.

Based on the assessment findings, a small portion of respondents in Armenia reported facing discrimination and negative behavior, while nearly one third expressed feelings of stress, anxiety, depression, or loneliness as a result of the situation created by the war. Additionally, some respondents emphasized the importance of professional support. In light of these findings, it is recommended to **establish comprehensive and accessible Mental Health and Psychosocial Support (MHPSS) services that are specifically designed to address the distinct needs of migrants and displaced people in Armenia.**

