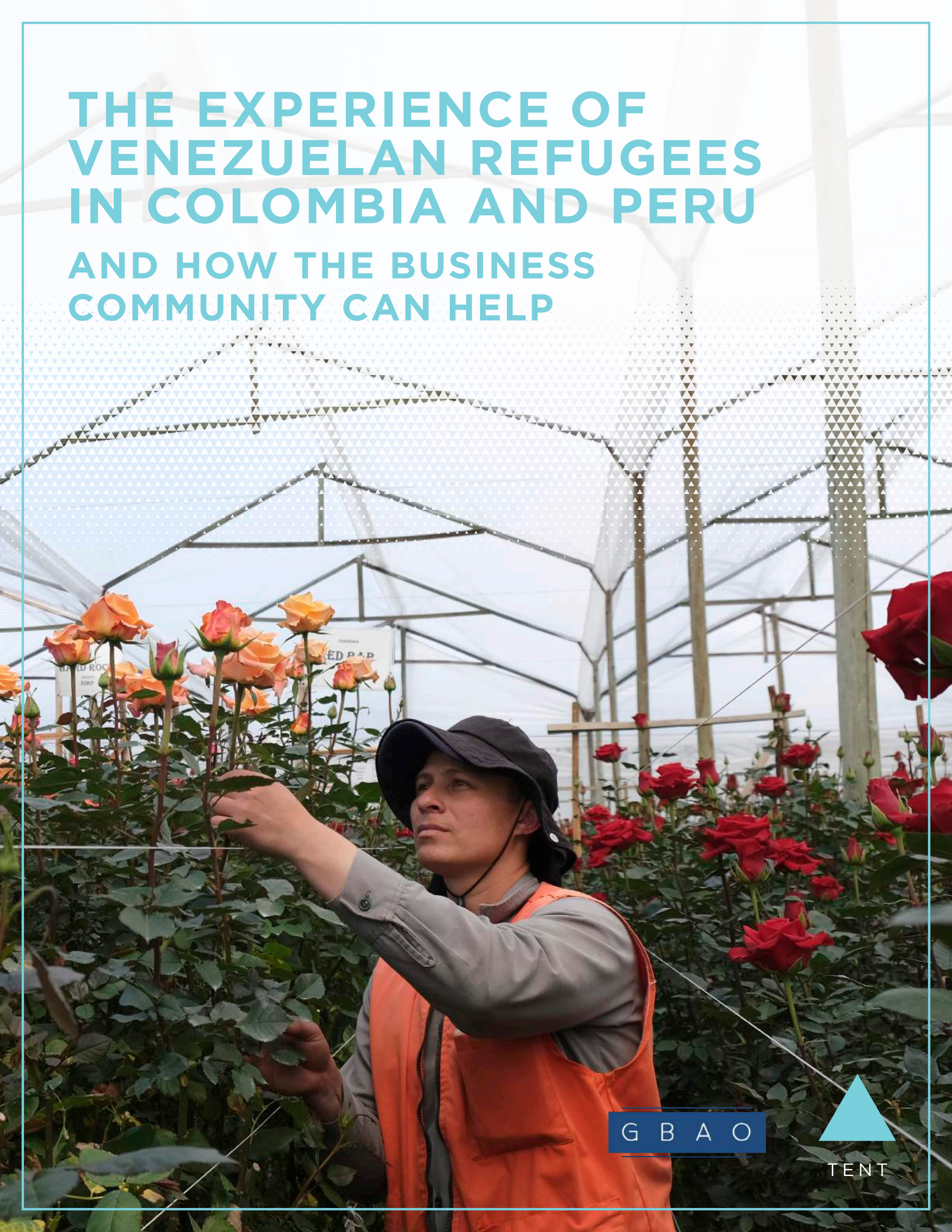


THE EXPERIENCE OF VENEZUELAN REFUGEES IN COLOMBIA AND PERU AND HOW THE BUSINESS COMMUNITY CAN HELP



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ABOUT GBAO

GBAO CONDUCTS PUBLIC OPINION RESEARCH AND PROVIDES STRATEGIC CONSULTING FOR CORPORATE COMMUNICATIONS, BRANDING STRATEGY, INTERNATIONAL RELATIONS, AND POLITICAL CAMPAIGNS AT ALL LEVELS OF GOVERNMENT. THE COMPANY DESIGNS GAME PLANS FOR A RANGE OF CLIENTS, INCLUDING CANDIDATES FOR OFFICE, SOCIALLY CONSCIOUS SMALL BUSINESSES AND FORTUNE 500 COMPANIES, LABOR UNIONS, PROGRESSIVE BALLOT INITIATIVE CAMPAIGNS, WORLD FAMOUS CULTURAL INSTITUTIONS, THINK TANKS, ADVOCACY GROUPS AND CIVIC ORGANIZATIONS.



TENT

ABOUT THE TENT PARTNERSHIP FOR REFUGEES

THE TENT PARTNERSHIP FOR REFUGEES, FOUNDED BY CHOBANI'S HAMDİ ULUKAYA, IS MOBILIZING THE PRIVATE SECTOR TO IMPROVE THE LIVES AND LIVELIHOODS OF MORE THAN 25 MILLION REFUGEES FORCIBLY DISPLACED FROM THEIR HOME COUNTRIES. TENT BELIEVES THAT THE PRIVATE SECTOR IS UNIQUELY POSITIONED TO ADDRESS THE GLOBAL REFUGEE CRISIS BY MOBILIZING THE NETWORKS, RESOURCES, INNOVATION, AND THE ENTREPRENEURIAL SPIRIT OF THE BUSINESS COMMUNITY – AND THAT COMPANIES HAVE THE GREATEST IMPACT WHEN THEY LEVERAGE THEIR CORE BUSINESS OPERATIONS TO HIRE REFUGEES, INTEGRATE THEM INTO THEIR SUPPLY CHAINS, INVEST IN REFUGEES, AND DELIVER SERVICES TO THEM. TENT CURRENTLY HAS OVER 130 MEMBERS.

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FOREWORD

The Tent Partnership for Refugees is a nonprofit organization that seeks to mobilize the business community to support refugees. In the face of the Venezuelan refugee crisis – which has pushed millions of Venezuelans into other countries and is already the largest refugee crisis in Latin American history – we commissioned GBAO with conducting a survey to understand better the experiences and intentions of Venezuelan refugees.

The findings of this survey – documented in the report that follows – provide valuable insights for any organization working on this crisis; they also underscore notably the need and opportunity for the business community to help Venezuelan refugees.

The report makes clear that many Venezuelans will remain displaced for many years to come. The vast majority of Venezuelans interviewed said they will not return home as long as Nicolas Maduro or his allies remain in power, even if the economic situation improves. And even in the most optimistic scenario, one in five Venezuelan refugees reported that they would not return home – suggesting that close to a million Venezuelan refugees may be permanently displaced. These findings are consistent with what we’ve seen in many places around the world, where one in two refugees is displaced for 20 years or more. What we’ve learned in situations of protracted displacement is that economic integration becomes all the more important, and we see the business community as playing a critical role in that effort.

The report also highlights a number of areas where Venezuelans are not being adequately integrated into the economy or realizing their economic potential. For example, the report highlights that only 15 percent of Venezuelans in Colombia have access to banking services – far lower than others in their host society, or for that matter than in Venezuela itself. This is a key constraint and impediment for Venezuelans. The research also emphasizes a range of ways that Venezuelans can be properly integrated into the labor market. For instance, many Venezuelans have professional experience in sectors that have local labor shortages – like manufacturing in Colombia or office support in Peru – and could be recruited into these harder-to-fill roles. These are all areas where the business community have a powerful opportunity to do much more to integrate refugees.

Ultimately, our hope is that this research will make it easier and more compelling for companies to engage with Venezuelan refugees as productive members of their new communities throughout Latin America.

GIDEON MALTZ
EXECUTIVE DIRECTOR
TENT PARTNERSHIP FOR REFUGEES



OVER THE PAST FOUR AND A HALF YEARS, MORE THAN FOUR MILLION VENEZUELANANS HAVE LEFT THEIR COUNTRY.

The bulk have gone to Colombia (1.3 million) and Peru (786,000), with large numbers also in Chile, Ecuador, Brazil, and Argentina.¹ Within Colombia, a plurality reside in Bogotá, with many close to the border in Cúcuta, Maicao, and Rio Hacha and others arriving in cities like Medellin and Barranquilla. In Peru, most of the refugees have gone to Lima.

¹ UNHCR. (2019 June 7). Refugees and migrants from Venezuela top 4 million: UNHCR and IOM. Retrieved from <https://www.unhcr.org/en-us/news/press/2019/6/5cfa2a4a4/refugees-migrants-venezuela-top-4-million-unhcr-iom.html>.

ARE VENEZUELANANS REFUGEES OR MIGRANTS?

Colombia and Peru technically recognize the majority of Venezuelans within their borders as migrants. However, many Venezuelans who have left the country are likely refugees as defined in the 1950 Convention Relating to the Status of Refugees and its 1967 Protocol. In addition, the vast majority of those who have been forcibly displaced from Venezuela meet the refugee definition in the 1984 Cartagena Declaration on Refugees, which adds to the definition of refugees as “persons who have fled their country because their lives, safety or freedom have been threatened by generalized violence, foreign aggression, internal conflicts, massive violation of human rights or other circumstances which have seriously disturbed public order”. The primary reasons for flight from Venezuela are the humanitarian crisis, increasing generalized violence, and widespread violations of human rights. These conditions have seriously disturbed public order and align with the Cartagena Declaration’s refugee definition.

For these reasons, we have elected to use the term “refugee” to refer to Venezuelans throughout this report.



The regional receptivity to the refugees has been mixed. Many countries were initially welcoming, but as the number of refugees has grown, some governments have imposed barriers to official entry by Venezuelans. The capacity of governments in the region and local NGOs to assist the refugees is stretched thin, and donations from other governments and international organizations have fallen well short of the refugees' needs.

The refugee crisis is likely to intensify in the coming months and beyond. The dire humanitarian conditions in Venezuela and political stalemate between the regime of Nicolas Maduro and Juan Guaidó, the opposition leader recognized by the United States and more than 50 other countries, are producing an accelerating flow of refugees who are likely to remain outside Venezuela for some time. The majority of Venezuelan refugees in Colombia and Peru have family members in Venezuela who will be joining them, and their return to Venezuela will depend

upon Maduro's exit and a democratic transition.

Most of the largely youthful population of refugees have found work, but their professional skills are underutilized and their families' access to health services and education is limited. With national and local governments in Colombia and Peru strapped for resources, and other countries and international agencies failing to provide adequate assistance, private companies have an opportunity to fill the void by tapping into a diverse labor market and expanding their presence in South America. Many refugees arrived with backgrounds in academia, business, and skilled labor, and are open to working in a variety of professional areas.

The experiences of the Venezuelan refugees in Colombia and Peru, and the support that businesses can provide them, depends in part on the refugees' location. In

both countries, many refugees are struggling to find satisfactory employment and access vital services. Colombia's efforts to support refugees have been admirable, but the challenges the country is facing in providing for the particularly large numbers who have arrived there is evident in the survey. Vital services like housing and clothing are less available there than in Peru. And a smaller share of refugees in Colombia have found formal full-time work. These findings take on added importance in light of actions taken by countries other than Colombia to tighten entry requirements for Venezuelans. The impact is already being felt as Colombia is receiving a higher share of Venezuelans who left their country this year.

These are some of the key conclusions from a poll of 600 Venezuelan refugees in Colombia and Peru, conducted by face-to-face interviews from July 31 to August 14, 2019. The survey was developed and administered by GBAO and sponsored by the Tent Partnership for Refugees. The interviews were conducted by Venezuelan refugees with experience in public opinion research. In Colombia the interviews took place in Bogotá, Medellín, Barranquilla, Cúcuta, and Rio Hacha, and in Peru in Lima, Tacna, and Piura.

DEMOGRAPHIC SUMMARY

Although the size, location, and demographic composition of the universe of Venezuelan refugees is not known with precision, the survey was designed to roughly reflect data on the location and demographic makeup of the Venezuelan refugees collected by governments, international bodies, and local NGOs. The survey sample is equally divided between men and women; half of the respondents are under 30 years old and nearly all under 50. About a quarter are college graduates, although the composition of

refugees has since become less educated over time as disenchantment with the Maduro regime has broadened to reach lower socio-economic levels and people with more limited means to sustain themselves outside Venezuela leave the country. The youngest refugees – those under 30 years old – are more likely to be skilled workers with at least some higher education. Overall, 24 percent of refugees interviewed for our survey in Colombia have a college or graduate degree and 25 percent have some college or technical training. In Peru, 24 percent have a college or graduate degree and 23 percent have some college or technical training.

Refugees who left Venezuela this year comprise about a quarter of the sample. These refugees are a little more male, very young, and include greater numbers of politically unaffiliated Venezuelans, as rejection of the Maduro regime has increasingly extended well beyond those affiliated with opposition parties.

LIMITED ACCESS TO HEALTH AND EDUCATION

The flow of refugees from Venezuela is driven principally by the shortage of food and medicine; only 1 percent of refugees cite political repression as the primary reason for leaving Venezuela (See Figure 1 in Appendix). Maduro's efforts to blame the economic crisis on the United States or political opposition is clearly failing, as nearly everyone interviewed said his regime is responsible.

Most refugees in Colombia and Peru did not make the trip from Venezuela alone, traveling with relatives and friends. They took with them only what they could carry, with the exception of those in Cúcuta, where a fair share of refugees travel back and forth between Colombia and Venezuela.



In their new countries of residence, many refugees are finding some relief from the deprivation in Venezuela. Nine in 10 in Colombia and Peru report their food and water needs are at least partially satisfied. Equal shares of refugees in Peru say the same about clothing and housing, although 8 percent of respondents there are homeless. In Colombia, somewhat fewer refugees than in Peru say they have adequate clothing and housing.

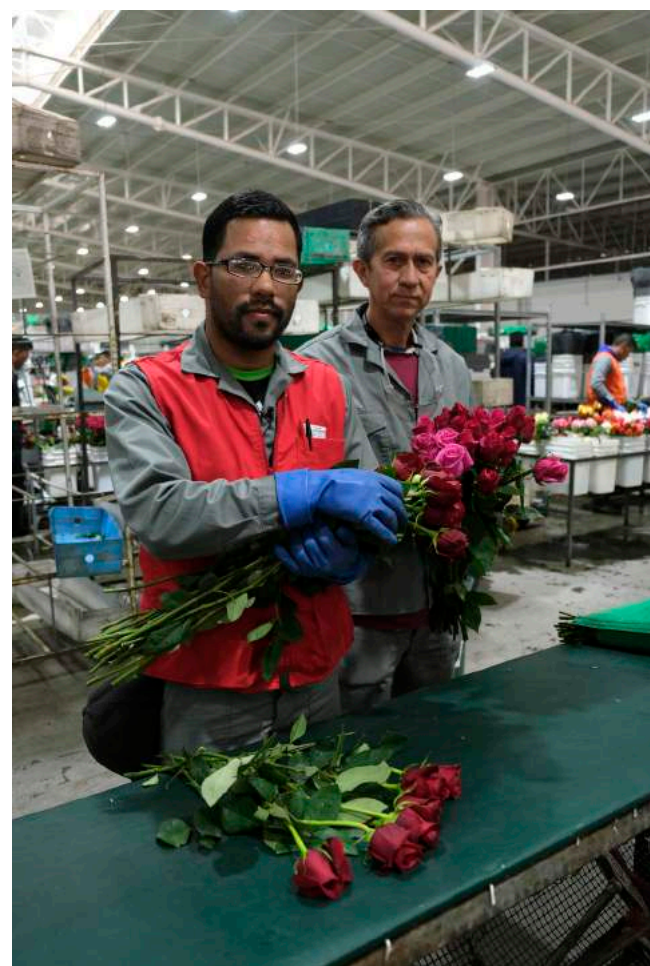
The more acute service shortfall is in the area of health, with only a combined 63 percent saying their needs are at least partially met. (See Figure 2) The refugees simply do not have the resources to meet their own needs as they arrived with small amounts of savings; very few have as much as the equivalent of \$200. Access to banking is also a challenge, especially in Colombia, where only 15 percent of Venezuelan refugees have a bank account.

The survey suggests that Venezuelans who arrived in Colombia and Peru this year are having greater difficulties securing basic services, with barely over half reporting their health care needs have been met. For those without a job (we discuss the employment status of the refugees in more detail below), the situation is particularly dire. Only 43 percent of unemployed refugees are at least partially satisfied with their access to health care. And while 82 percent of employed refugees who have children see their school needs at least partially met, only 60 percent of unemployed refugees with children feel the same.

Venezuelan refugees' precarious economic state is exacerbated by discrimination and criminality to which they are subject. Over one-quarter say they have faced xenophobia or discrimination at work, and one in five have been victims of robbery. Refugees in Cúcuta are especially likely to report xenophobia and robbery. In

Colombia, significant shares report abuse by residents of their community (Cúcuta especially) and security forces (See Figure 4).

Criminal groups are also seeing refugees as a potential source of recruits. Although the sample sizes are small, 10 percent of refugees interviewed in Medellín and 28 percent in Cúcuta say criminal groups have tried to recruit them or their family members.



GROWING REFUGEE POPULATION

The survey supports projections that the number of refugees is likely to rise considerably over the next year, absent a peaceful democratic transition in Venezuela.

Although the vast majority of refugees, especially in Peru, have sent or plan to send money to family back home, most, with the exception of those in Medellín and Baranquilla, have family members who plan to join them. Nearly four in five refugees have left one or both parents behind in Venezuela, and over half have left brothers and sisters. Many in Colombia left their children.

The growth in the refugee population could be mitigated somewhat by the advice some refugees are giving their family members still in Venezuela not to migrate. About one in five in Colombia overall and two in five in Bogotá specifically are urging their family members to stay in Venezuela (in contrast to just one in 25 in Peru). In both Peru and Colombia, about half suggest their family migrate to another country (See Figure 5). Few refugees themselves, however, plan to leave Peru or Colombia. For those who do plan to leave, Chile is the most desired destination.

CHALLENGES IN ATTAINING LEGAL STATUS

New arrivals, like those who have already migrated, will likely struggle with legalizing their status as receiving countries modify the regulations for admittance and legalization. While nine in 10 refugees have the official Venezuelan ID card, only half have a Venezuelan passport, which is now required for entry into Peru. Obtaining passports has become more difficult in Venezuela; of those who left the country this year, only one-third possess a passport.

Most refugees in Peru are registered with an organization or the state, or hold a permit. Most in Colombia are not registered in any manner, especially those under 35 years old.² In both countries, those with lower educational attainment are less likely to be registered.



The leading obstacle to official registration appears to be a lack of knowledge about the process, providing an opening for private sector actors to help finance or design outreach and education efforts by governments and NGOs. About four in 10 of those who are unregistered say they do not know how to apply (and about one in five could not answer why they are not registered). One in six say the process is too slow or costly. There appears to be a great deal of confusion as well about how to apply for political asylum. Only 15 percent say they have applied, and the bulk of the rest indicate they do not understand the process.

The survey shows the value of being registered with the Peruvian and Colombian governments. Almost all refugees with a PEP, or Permiso Especial de Permanencia, in Colombia or who have the Permiso

² While the majority of Venezuelans surveyed for this report are not registered in any manner, over 600,000 Venezuelans in Colombia are in fact registered with the Colombian government. Source: UNHCR. (2019 August 1). Venezolanos en Colombia. Retrieved from <http://www.migracioncolombia.gov.co/index.php/es/prensa/infografias/infografias-2019/12565-infografia-venezolanos-en-colombia>.

Temporal de Permanencia (PTP) in Peru, have a job. Those with a PEP or PTP are more likely to earn a salary working for a legally registered business, and earn more money. In Colombia, those without a work permit tend to earn money from the direct sale of goods; in Peru, they are more likely to make money in exchange for a task or day's work. Assessing cause and effect is difficult, however, as refugees who have registered are also more likely to have higher levels of education, which facilitates registration and provides greater employment opportunities.

Any effort to educate refugees about their rights can have a digital component since the vast majority of Venezuelan refugees in Venezuela have internet access, and most use mobile phones – whether their own or someone else's – the survey shows.

MORE DIFFICULT WORKING CONDITIONS IN COLOMBIA

The vast majority of refugees – about four in five – have found employment, but the work is difficult and precarious for many, especially in Colombia, which is facing the challenge of absorbing large numbers of refugees while implementing a fraught peace process in the midst of an economic slowdown.

Refugees lean on their support network to find work – half get their information about new job opportunities through friends. In Peru, a significant number of refugees have found opportunities via public notices in publications and online (See Figure 6).

Almost all workers have one job and for many, the hours are long and the wages low. Overall, four in five work more than 40 hours a week; almost half work more than 60 hours, and 21 percent more than 70 hours weekly (See Figure 7). In Colombia, refugees are finding it

harder to find full time work; more than one-fourth work fewer than 20 hours a week.

The nature of employment for Venezuelan refugees varies significantly between Colombia and Peru. In the former, a plurality are self-employed, and many are working for unregistered businesses, especially in Barranquilla. In Peru, the vast majority work for an employer, and much fewer than in Colombia work for enterprises in the informal economy (See Figure 8). As a result, refugees in Peru have more consistent income than those in Colombia. In Peru, a plurality earn a regular salary, whereas in Colombia a plurality are paid directly for goods or services (See Figure 9).

Not surprisingly, few refugees – just one in six – work in the same field as they did in Venezuela. For example, only 4 percent of the current refugees sold goods when they were living in Venezuela; now, outside of Venezuela, 40 percent do. Five percent of refugees performed unskilled labor in Venezuela, and now 14 percent of them do. Of those with degrees or certifications from Venezuela – 44 percent, which includes some students who left Venezuela before completing their degree – only 3 percent have been able to get re-certified in Peru or Colombia. Most of the self-employed refugees in both countries sell food products, although in Colombia many of them are providing other services such as house cleaning, child care, and delivery.

Despite the downgrading of their professional careers, the vast majority of refugees are at least somewhat satisfied with their jobs, including one-third who are very satisfied. Refugees in Rio Hacha and lower-paid workers overall in Colombia are the exception, however. A majority in Rio Hacha are dissatisfied with their jobs, although the sample size (50 interviews) is small. And most of those who make 900,000 pesos or less (the



equivalent of about \$260) are dissatisfied with their jobs; in Peru, in contrast, refugees who earn the dollar equivalent in sales report as much satisfaction with their jobs as higher-paid employees (See Figure 10).

That high level of discontent among lower-paid refugees in Colombia is driven in part by the more difficult working conditions they report. Nearly as many say they have been exploited at work as not, with the leading complaint being low wages, followed by excessive hours (See Figure 11).

The more favorable employment picture in Peru is clouded by the more adverse circumstances that women face there. Even though more Venezuelan women in Peru have university degrees than their male counterparts, fewer women work and more are dissatisfied with their jobs. They are also more likely to toil as a vendor than practice their previous profession. The difficult labor circumstances for women are even

more troubling given that female refugees in Peru are more likely to have children to support, according to the survey.

FLEXIBILITY IN PURSUIT OF BETTER EMPLOYMENT

Given the difficulty in finding meaningful and well-paid jobs, many refugees are looking for new work. That is particularly the case in Colombia, where close to three-fourths are looking for a job, in contrast to just 44 percent in Peru. This includes refugees who are already working: two-thirds of employed refugees in Colombia and one-third in Peru are searching for a better job.

Venezuelan refugees are willing to move to another area for better work. Nine out of 10 in Colombia and two-thirds in Peru would move to another part of Peru or Colombia for a better job. They are willing to relocate to another country as well, with Chile being the most favored destination (See Figure 12).

Companies in a range of industries would find a capable and eager workforce among these refugees. Women tend to be looking for work in business, commerce, or administration, followed by hospitality, education, and medicine. Men's interests are more diverse, with greater numbers leaning toward factory or construction work and technology (See Figure 13).

RETURN TO VENEZUELA CONDITIONED ON SIGNIFICANT POLITICAL AND ECONOMIC CHANGE

Nearly all refugees in Colombia and Peru – 95 percent – hope to return to Venezuela some day, but they say they will not do so absent both the fall of Maduro and the Socialist Party and economic recovery. The vast majority say they would not return under more favorable economic conditions if Maduro is still in office, in apparent recognition that sustained recovery and availability of basic goods and services in Venezuela will not be possible as long as he is president. Nor would they return if Maduro is replaced by a politician from the ruling Socialist Party or if the regime and opposition form a unity coalition.

If negotiations brokered by the international community lead to new elections or if Maduro is replaced by Guaidó or another opposition leader, many refugees would return, especially if there is an economic recovery (See Figure 14).

Nevertheless, some refugees who are having a tougher time in their new country of residence are more eager to return to Venezuela under less than ideal conditions. For example, among lower-income refugees in Colombia, 41 percent say they would be very or somewhat likely to return under a scenario in which Maduro is replaced by a politician from his own ruling party.

IMPLICATIONS FOR PRIVATE SECTOR ENGAGEMENT

As the business community and other actors weigh how to support Venezuelan refugees, these survey findings can help guide them. Although the needs are great in many areas, there are a few factors worth considering as companies develop commitments to support refugees:

- ▶ The particularly large population of refugees in Colombia is straining the capacity of the country to assist them. Access to services there is more limited, and good jobs are harder to find. The Colombian Government has demonstrated admirable generosity and political will in welcoming refugees, and institutions there have proven to be capable partners worthy of support from international actors.
- ▶ Women in particular are getting less support than they need and seem to be facing gender discrimination. In addition to the direct impact that assistance could have on women who need support, studies on development have shown the broader positive family and community effects of targeting women for aid.
- ▶ Too many refugees remain unregistered. Registration facilitates more and better job opportunities and access to services. To the extent that lack of knowledge of the process is preventing some refugees from registering, private sector actors can support outreach and education efforts by governments and NGOs.

- ▶ Refugees, who have already made difficult journeys, are prepared to travel to other locations, including other countries, for work. Private companies do not need to impose geographic limits on their recruitment efforts.
- ▶ Many refugees come with formal professional credentials, but almost none have been able to get recertified. Companies could find significant value in helping refugees to be re-credentialed, training them to upgrade their skills, or developing alternative mechanisms — beyond credentials — to assess and validate existing skills.
- ▶ Venezuelan refugees can fill positions for which qualified local candidates are harder to find. Many refugees are well-educated and have professional experience and can serve in management positions; others have skills that are in short supply locally (See Figure 15). A 2018 ManpowerGroup survey³ found that among the hardest roles to fill in Colombia are those in manufacturing, skilled trades (like electricians, welders, and mechanics), and management. Of the Venezuelan refugee population surveyed in Colombia, nearly one in 10 are looking for a factory job, 4 percent are interested in mechanics (9 percent cite having worked in a specialized trade when living in Venezuela), and 8 percent seek jobs in administration. Similarly, in Peru, office support, sales representatives, workers in skilled trades, and technicians are among

the most sought-after employees, according to the ManpowerGroup study. Of those refugees surveyed in Peru, 9 percent were either supervisors or office workers, 10 percent worked in skilled trades, and 8 percent were technicians. Additionally, the high number of former Venezuelan university professionals and students in both countries (30 percent in Colombia and 24 percent in Peru) promises workers who can fill roles in sales and general management.

- ▶ Few refugees have bank accounts. Providing financial products and services such as digital bank accounts or mobile banking would help refugees establish financial stability. In Venezuela, 73 percent of residents have bank accounts as of 2017,⁴ which they rely upon for instant transfers and debit withdrawals in a time of huge cash shortage. Upon arrival in Colombia and Peru, however, Venezuelans have been unable to open accounts at the same rate, limiting their ability to save or access and build credit. In Colombia, only 15 percent of refugees have bank accounts and in Peru, 40 percent of refugees do.
- ▶ Large numbers of Colombians and Peruvians are disadvantaged themselves. Programs designed to support communities broadly where refugees live rather than focused solely on the refugees could ease the discrimination that many refugees are experiencing.

³ ManpowerGroup. (2018). Solving the Talent Shortage: Build, Buy, Borrow and Bridge. Retrieved from <https://go.manpowergroup.com/talent-shortage-2018>.

⁴ Most recent banking estimates released by The World Bank in 2017. The World Bank Group. (2019). Universal Financial Access 2020. Retrieved from <https://ufa.worldbank.org/en/country-progress/venezuela-rb>

APPENDIX

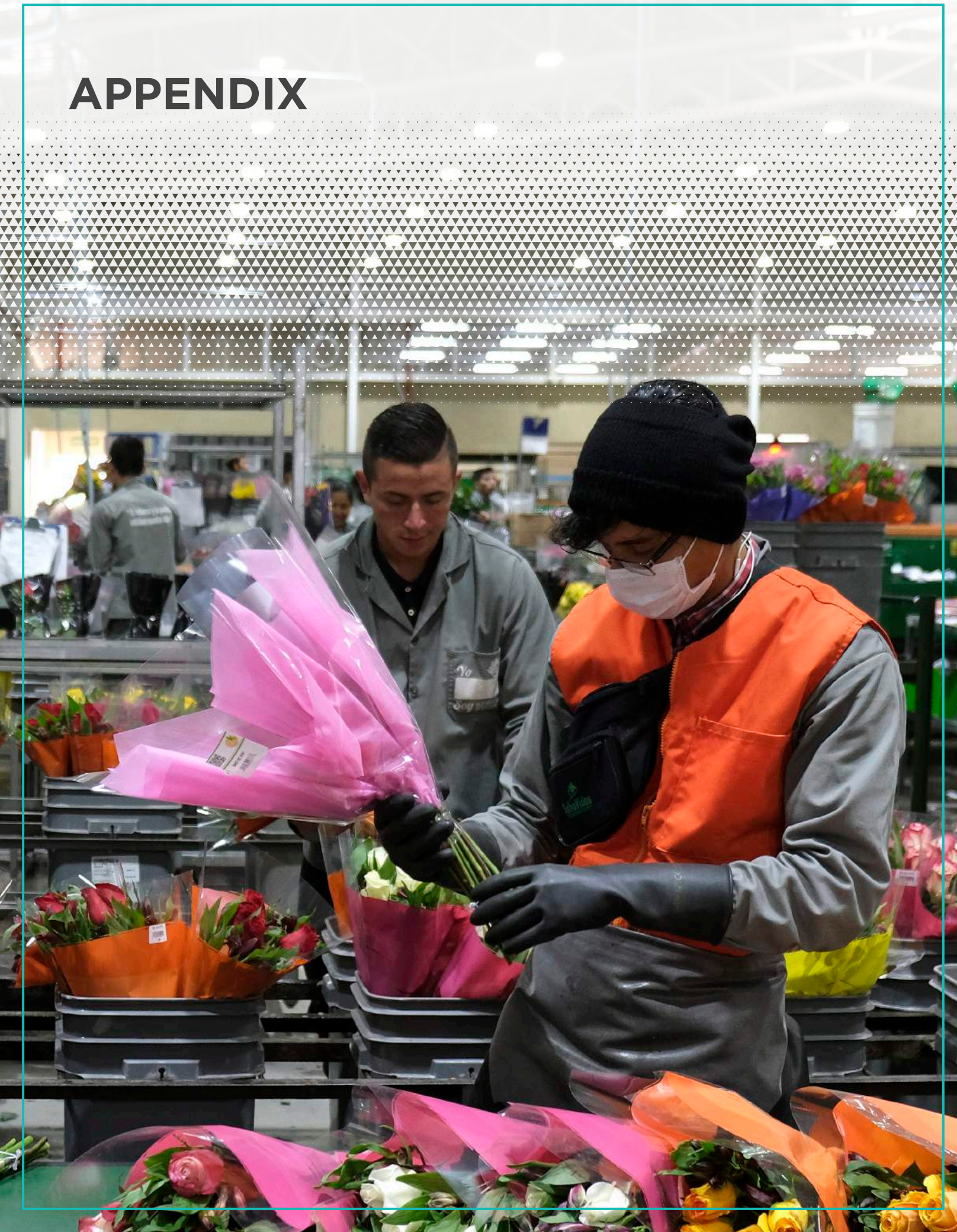


FIGURE 1 | PRINCIPAL REASON FOR LEAVING VENEZUELA

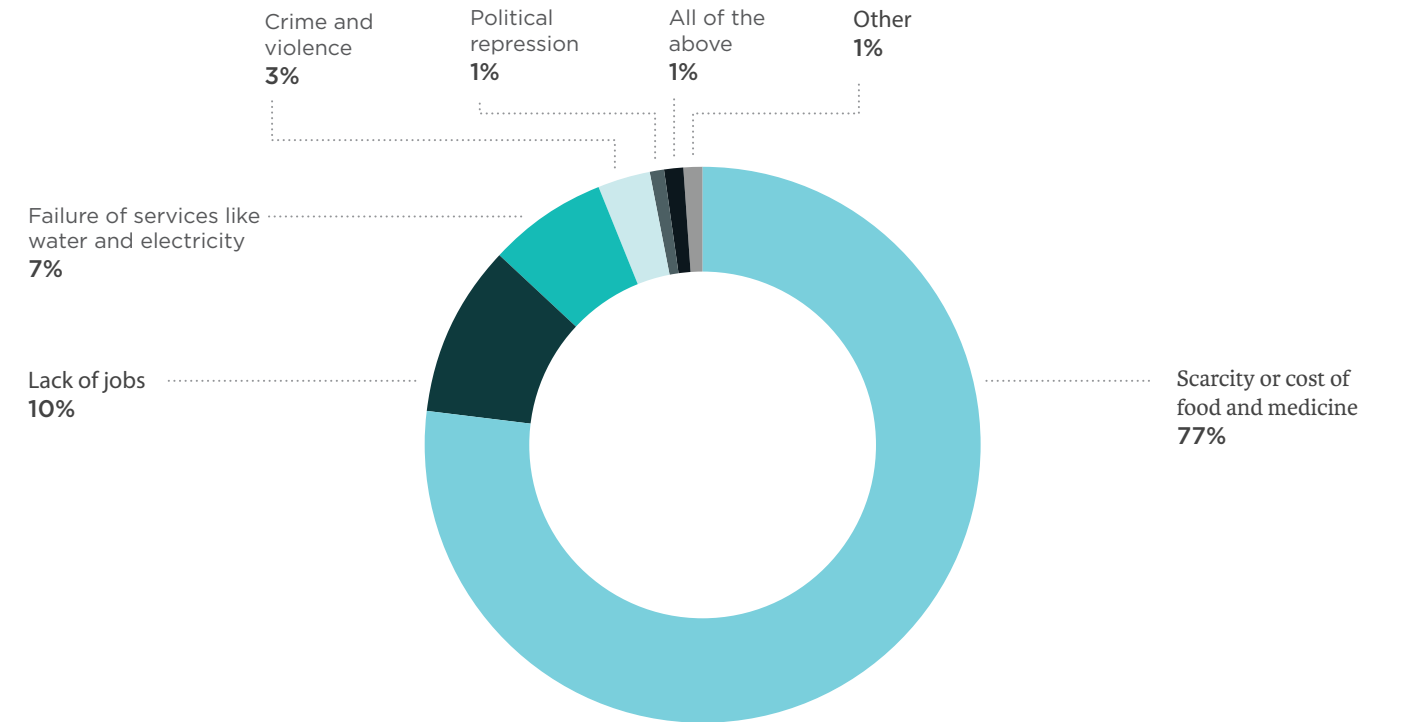


FIGURE 2 | AVAILABILITY OF BASIC AMENITIES

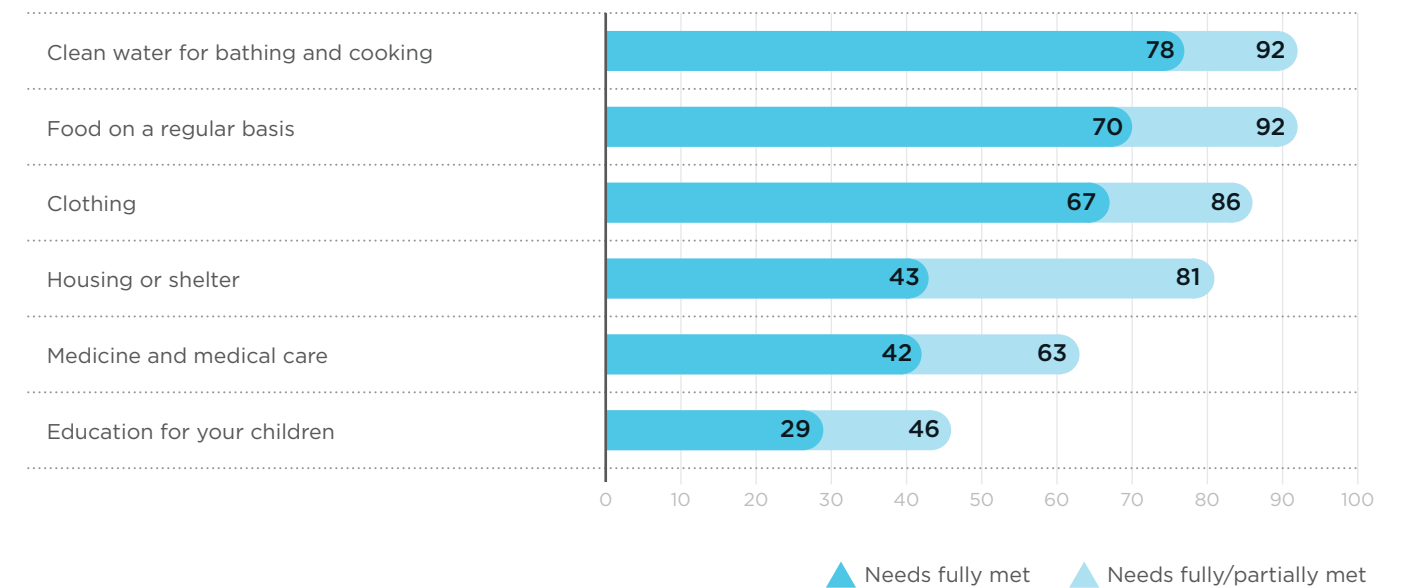


FIGURE 3 | VENEZUELAN WITH BANK ACCOUNTS

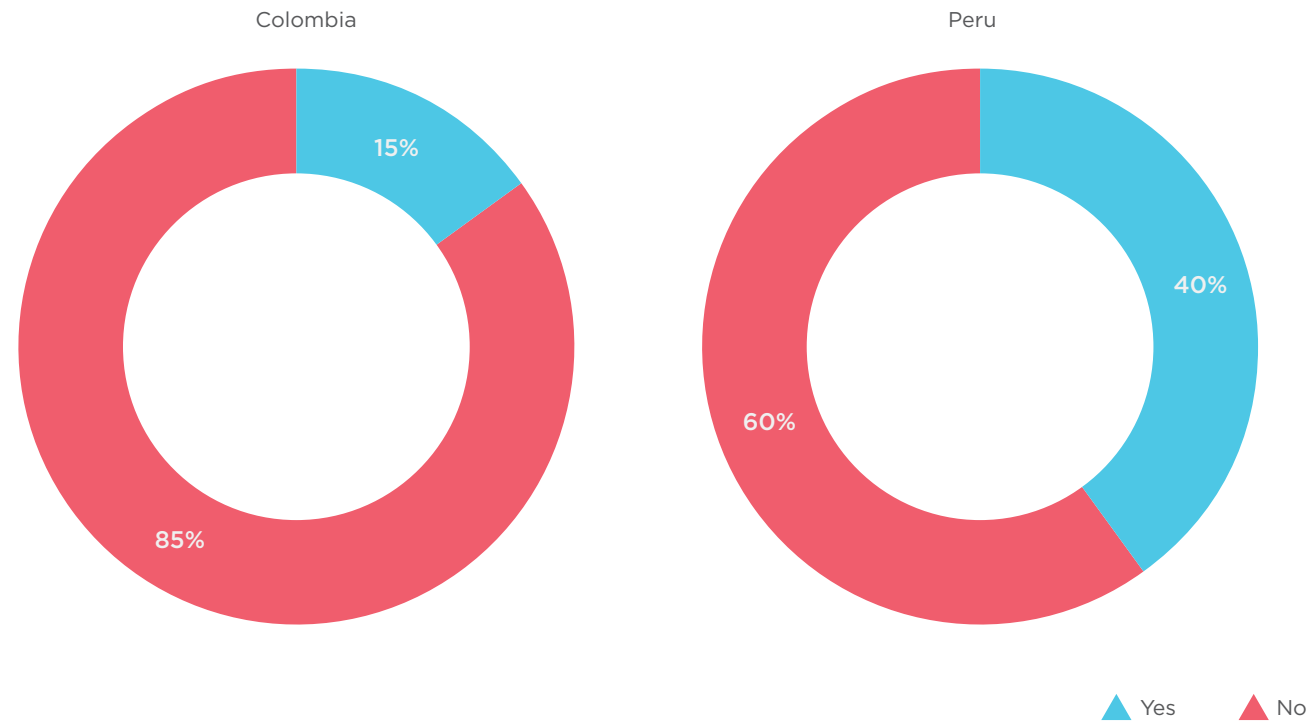


FIGURE 4 | CHALLENGES FACED IN HOST COUNTRY

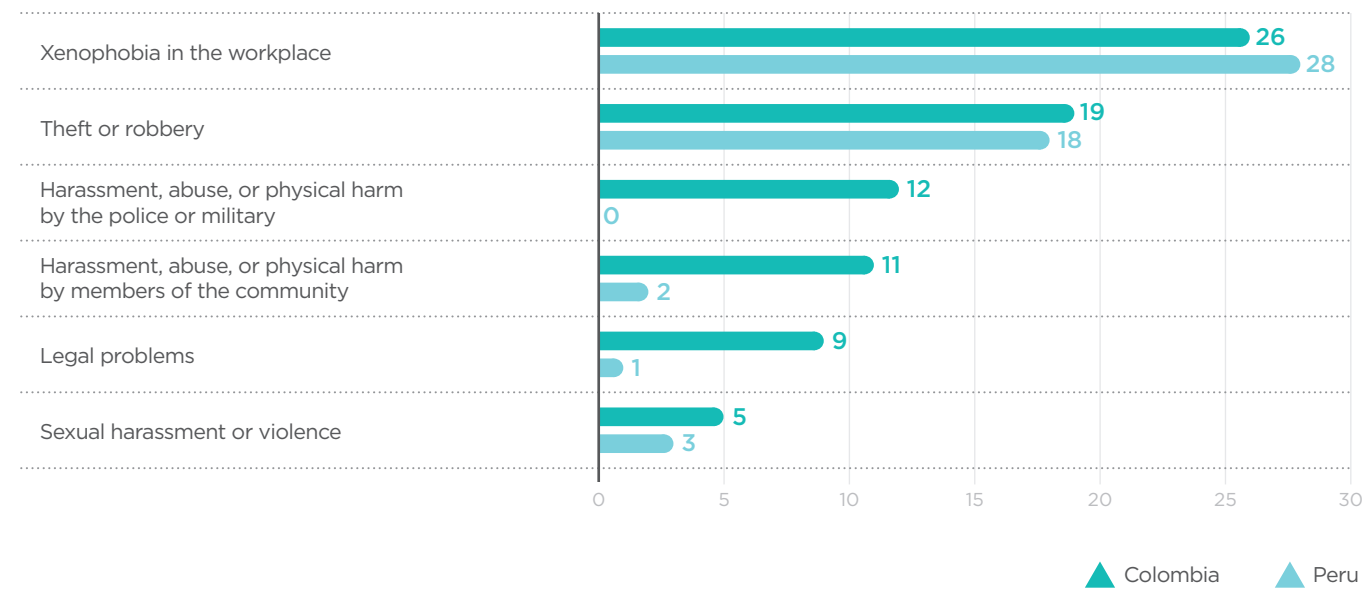


FIGURE 5 | ADVICE TO OTHERS

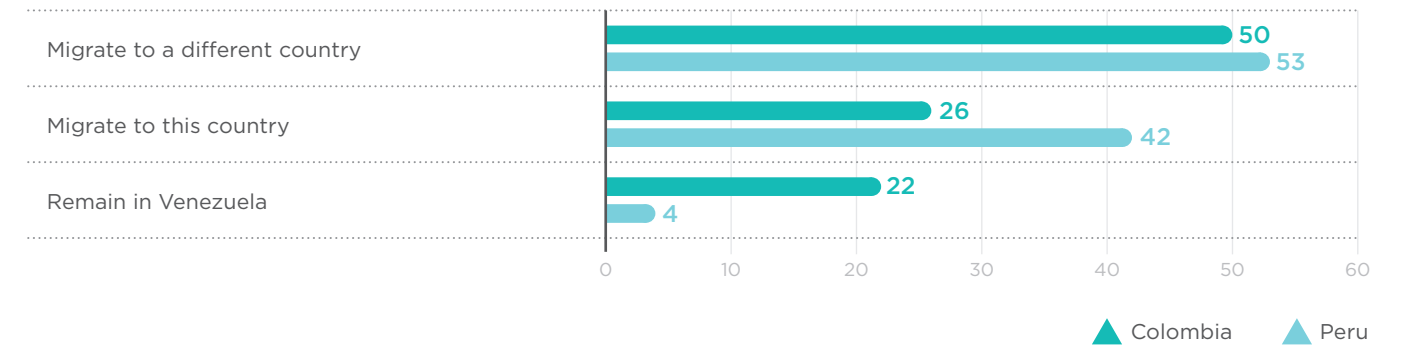


FIGURE 6 | JOB SEARCH RESOURCES

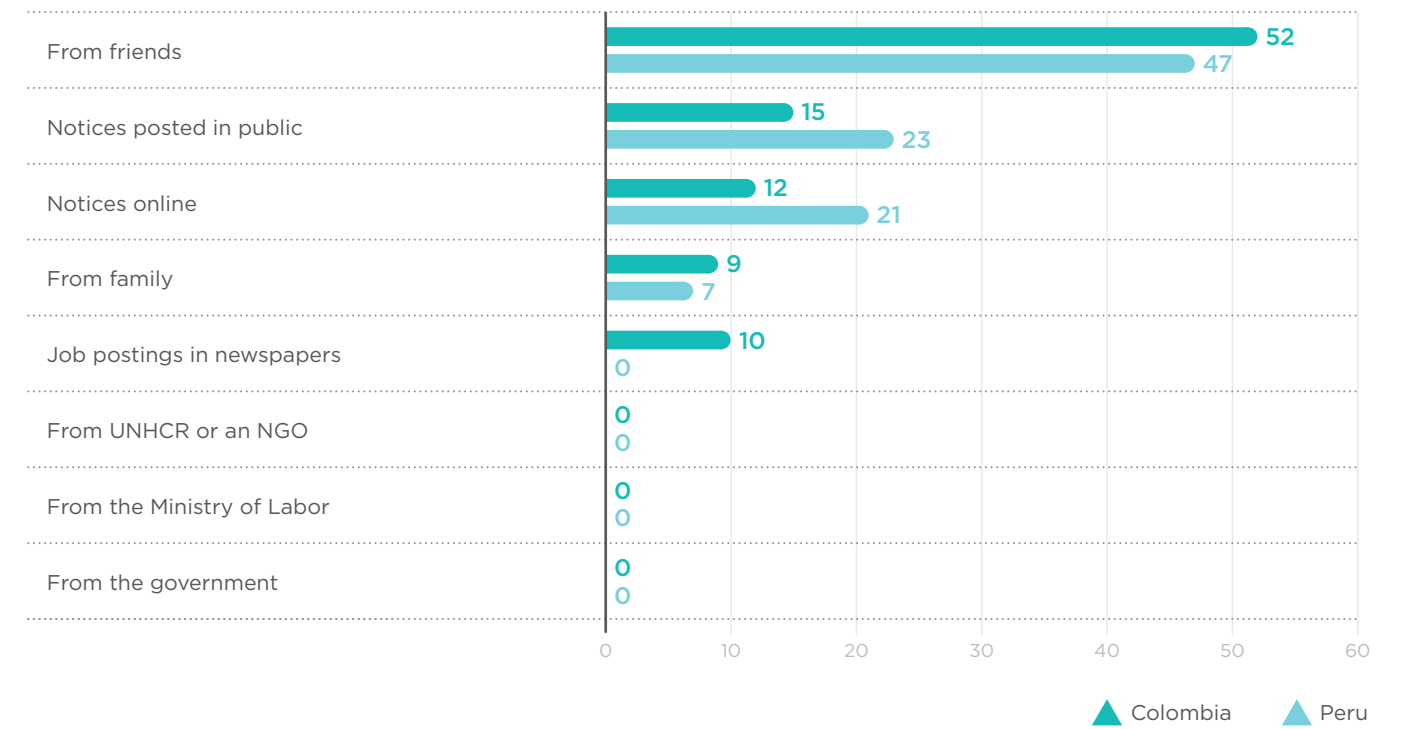


FIGURE 7 | HOURS WORKED

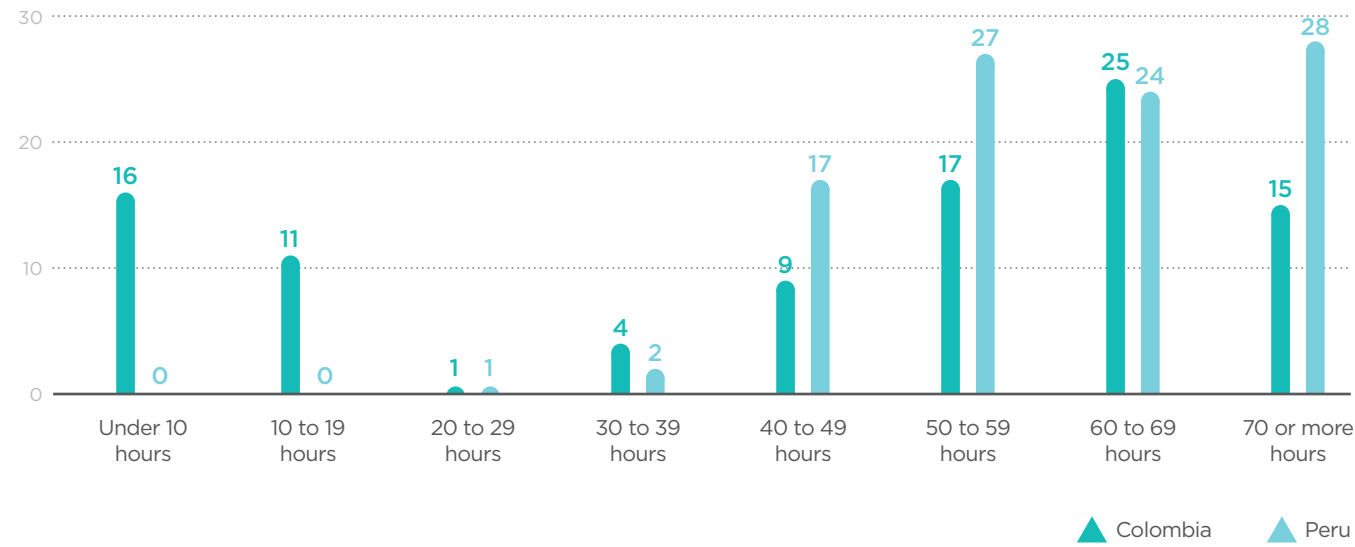


FIGURE 9 | FORM OF INCOME

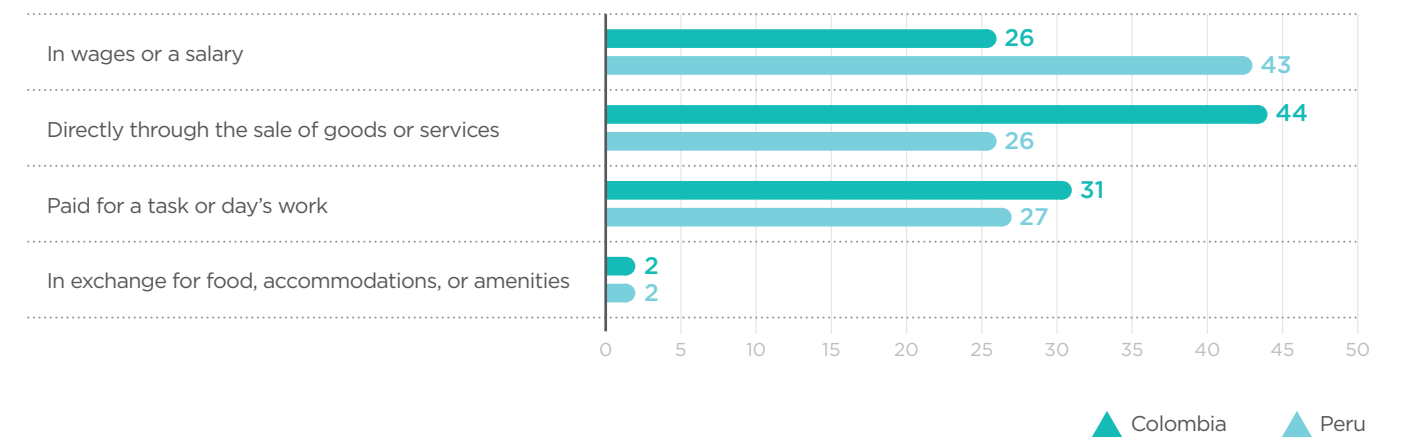


FIGURE 8 | TYPE OF EMPLOYMENT

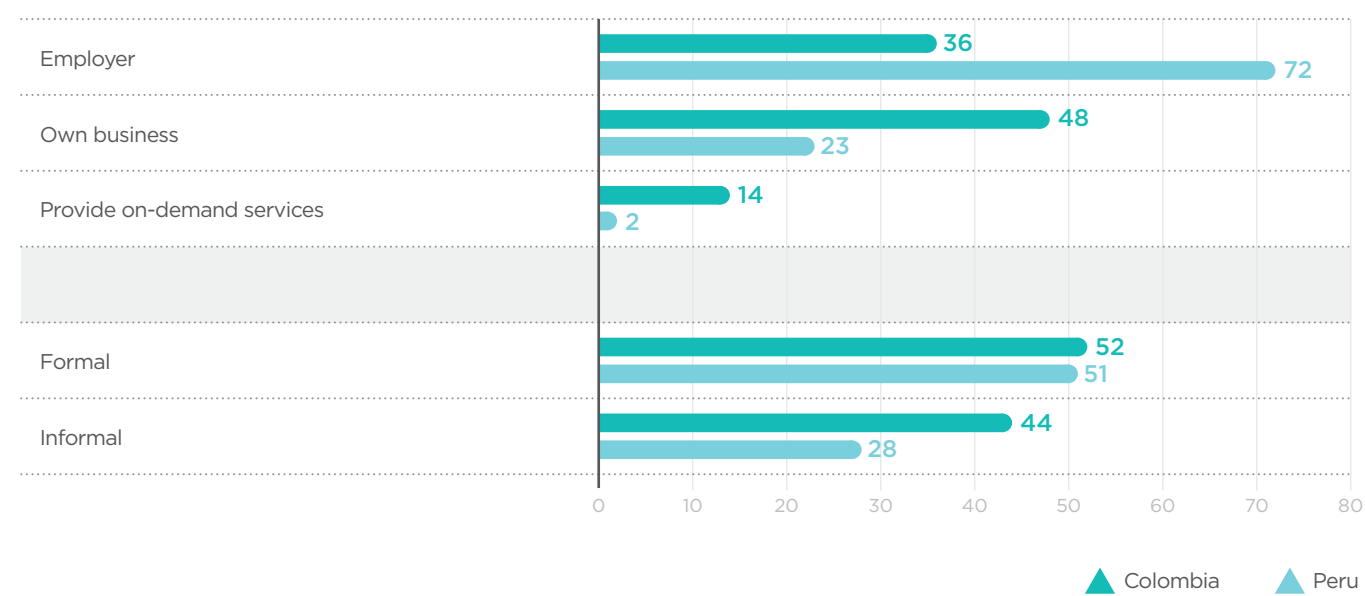


FIGURE 10 | JOB SATISFACTION

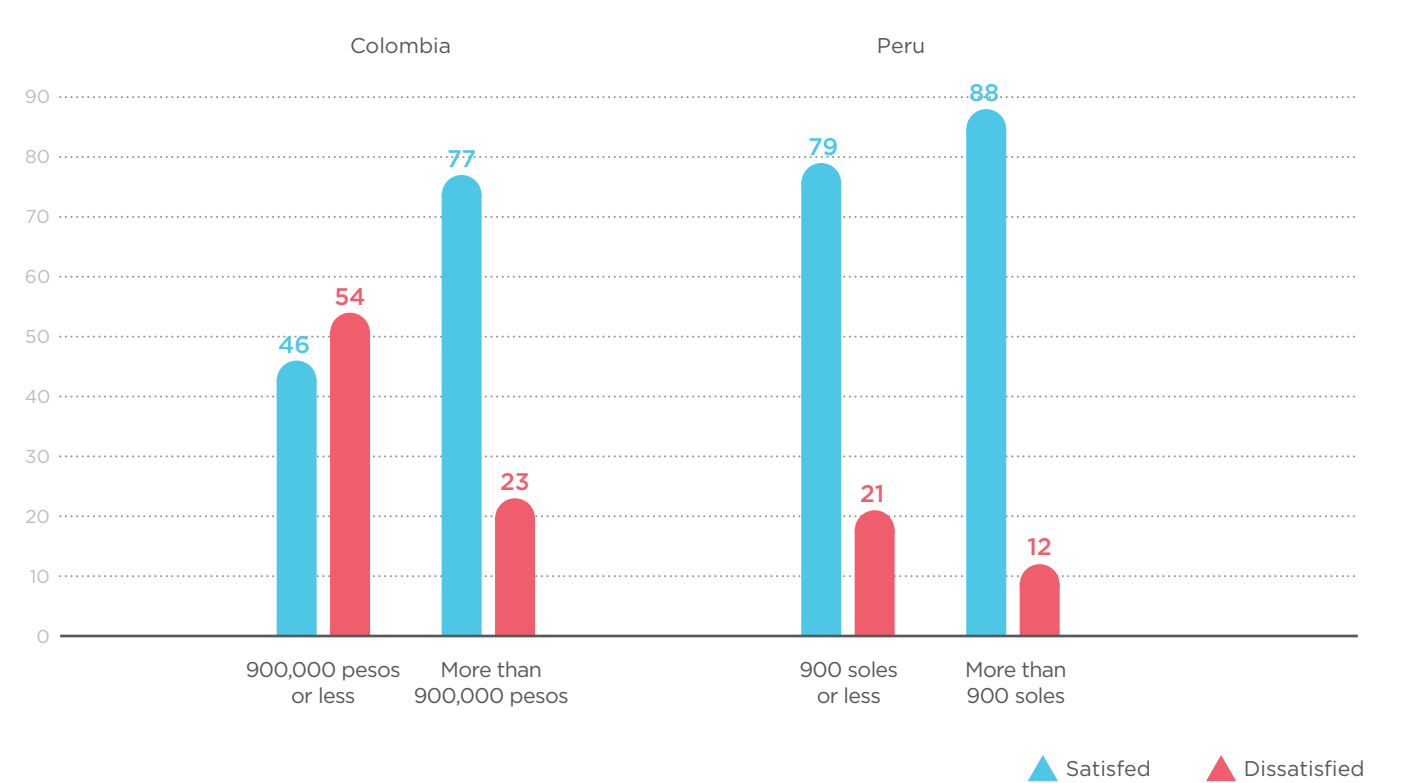


FIGURE 11 | TYPES OF EXPLOITATION EXPERIENCED

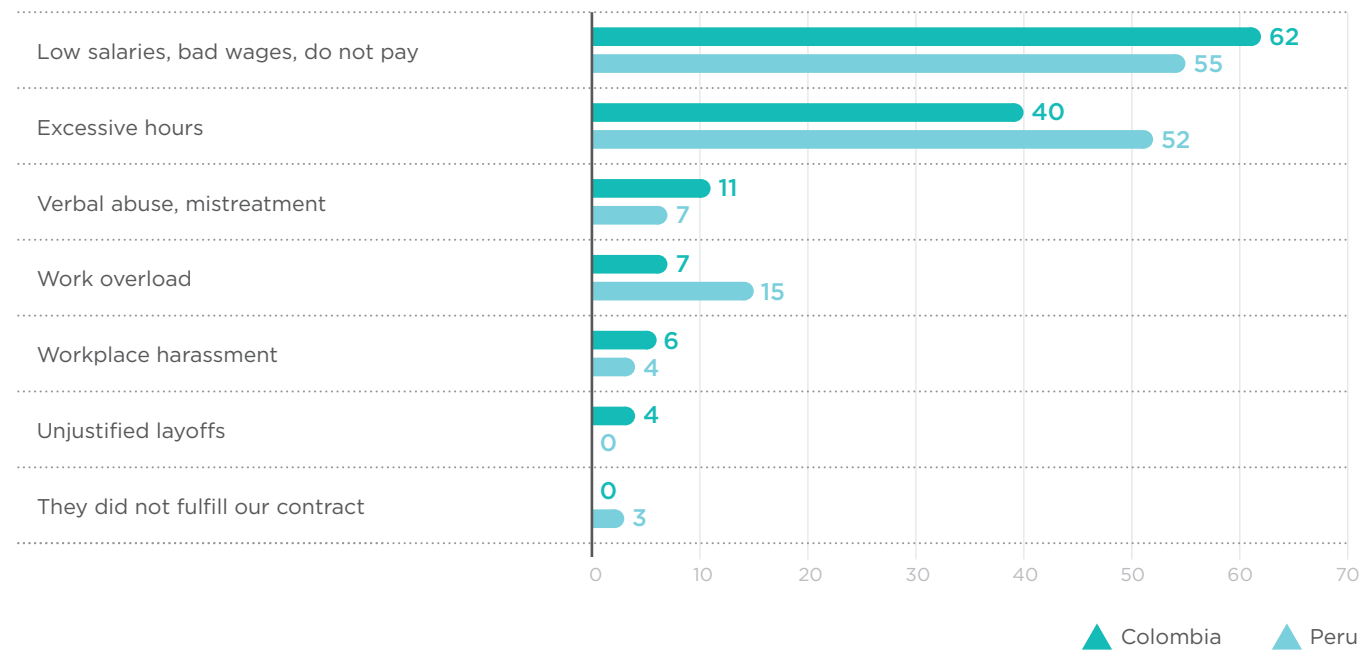


FIGURE 12 | POTENTIAL DESTINATIONS

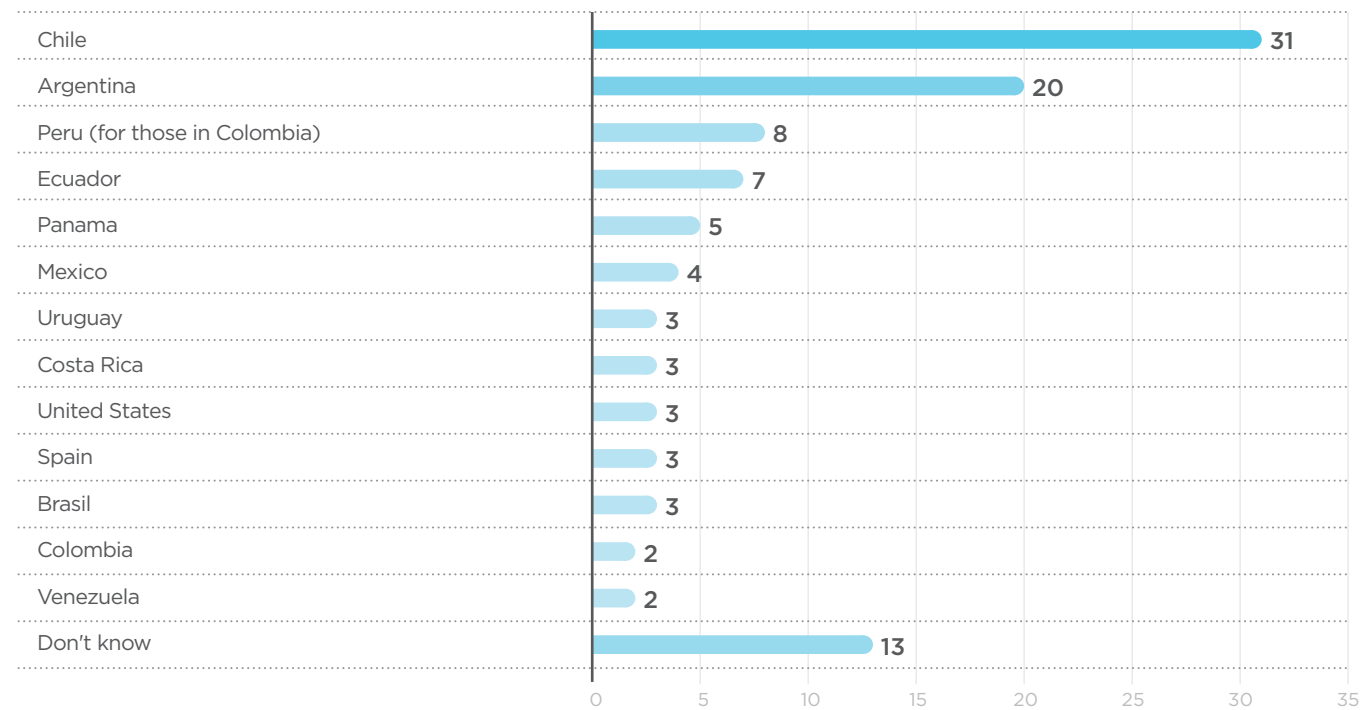


FIGURE 13 | DESIRED AREA OF EMPLOYMENT

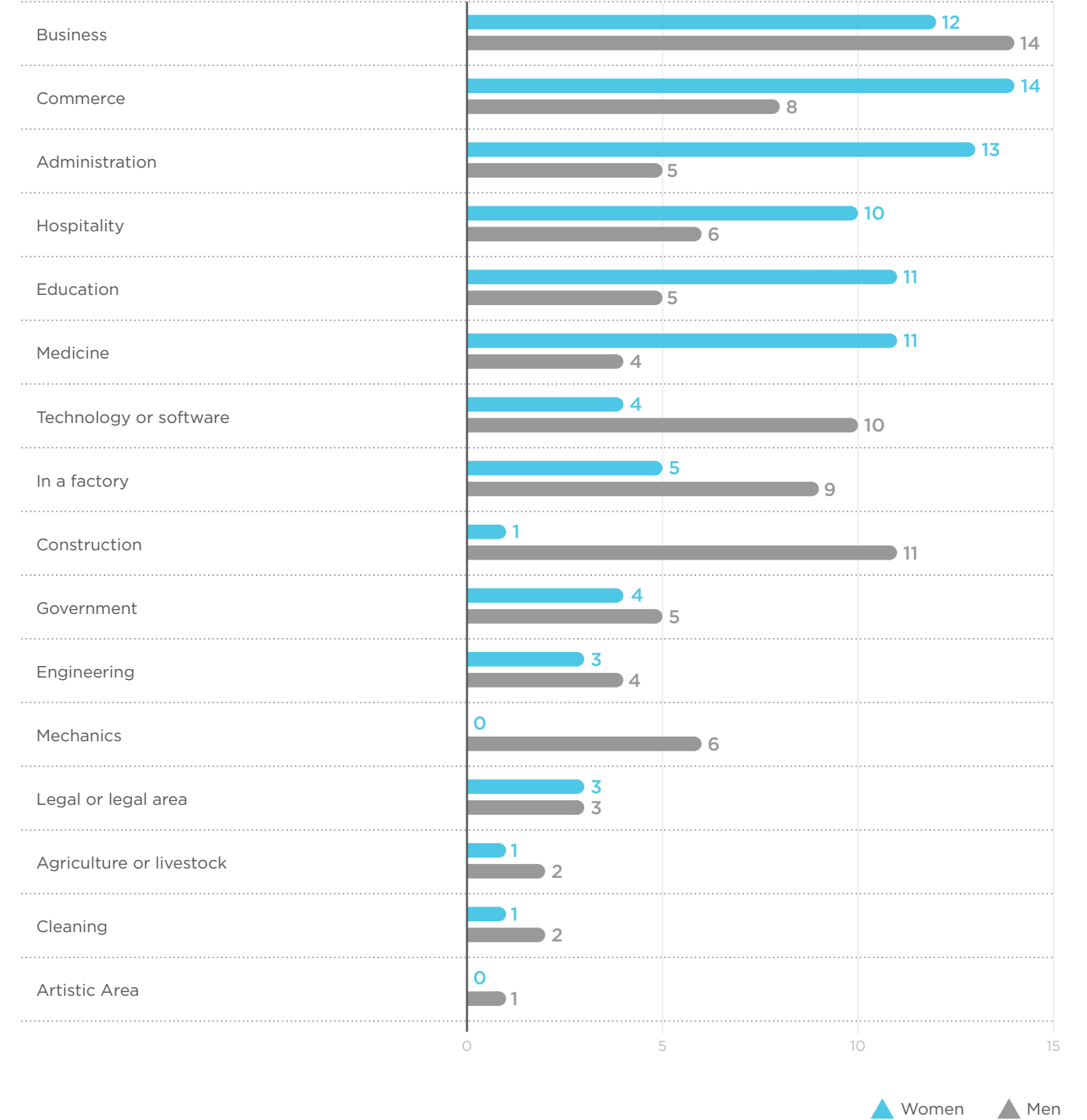


FIGURE 14 | SCENARIOS FOR RETURN TO VENEZUELA

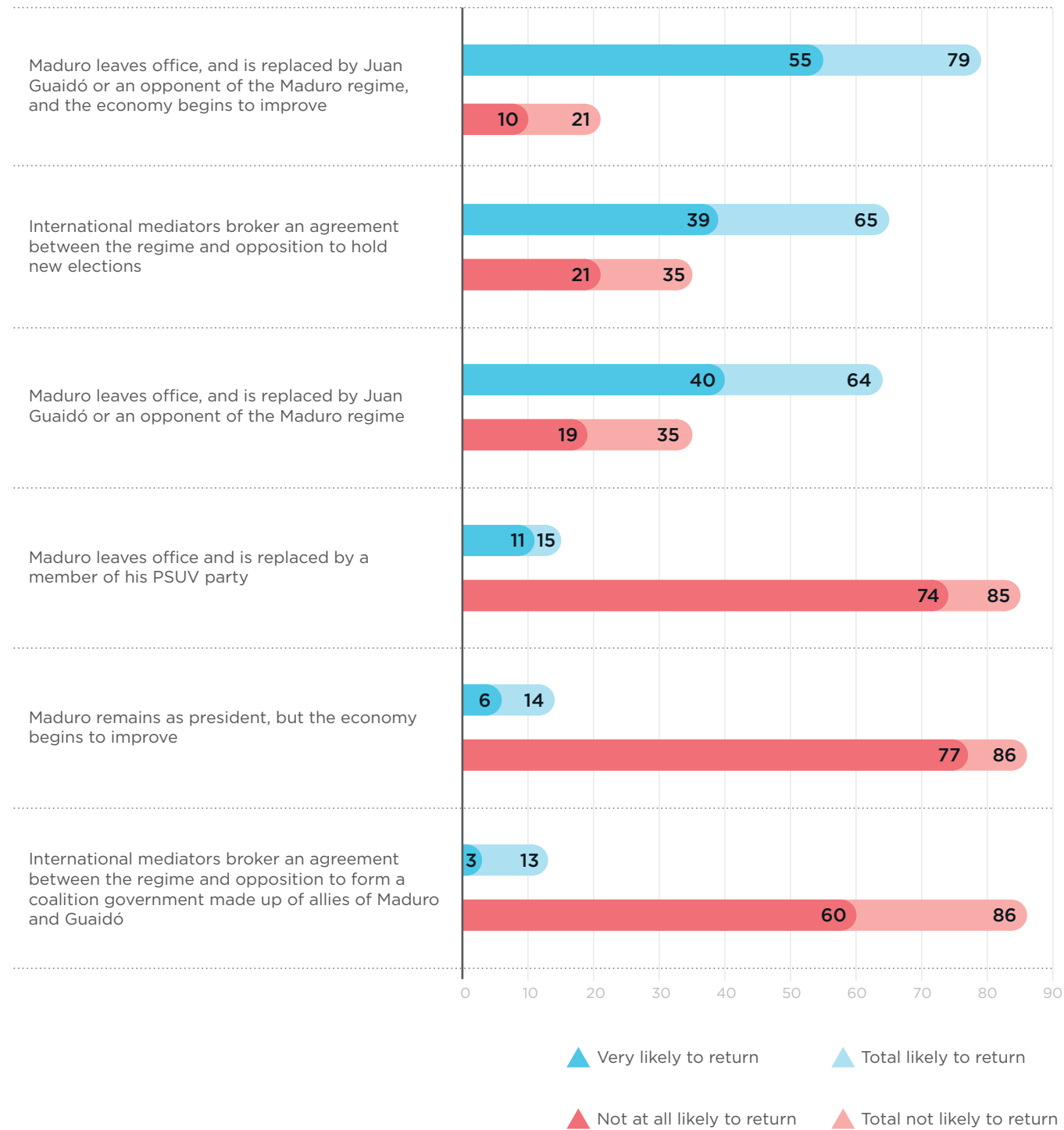
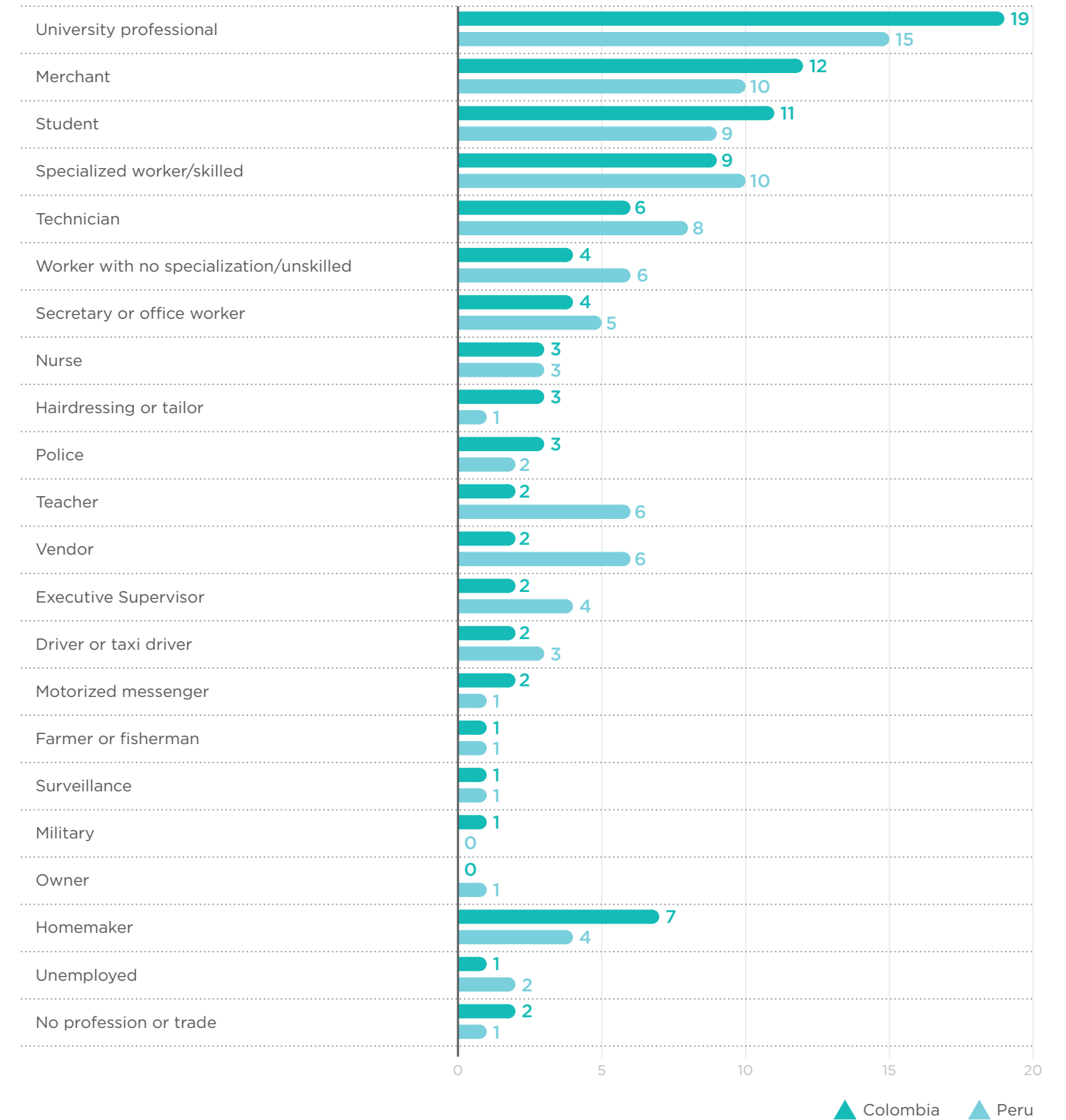


FIGURE 15 | PROFESSION IN VENEZUELA PRIOR TO DISPLACEMENT



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