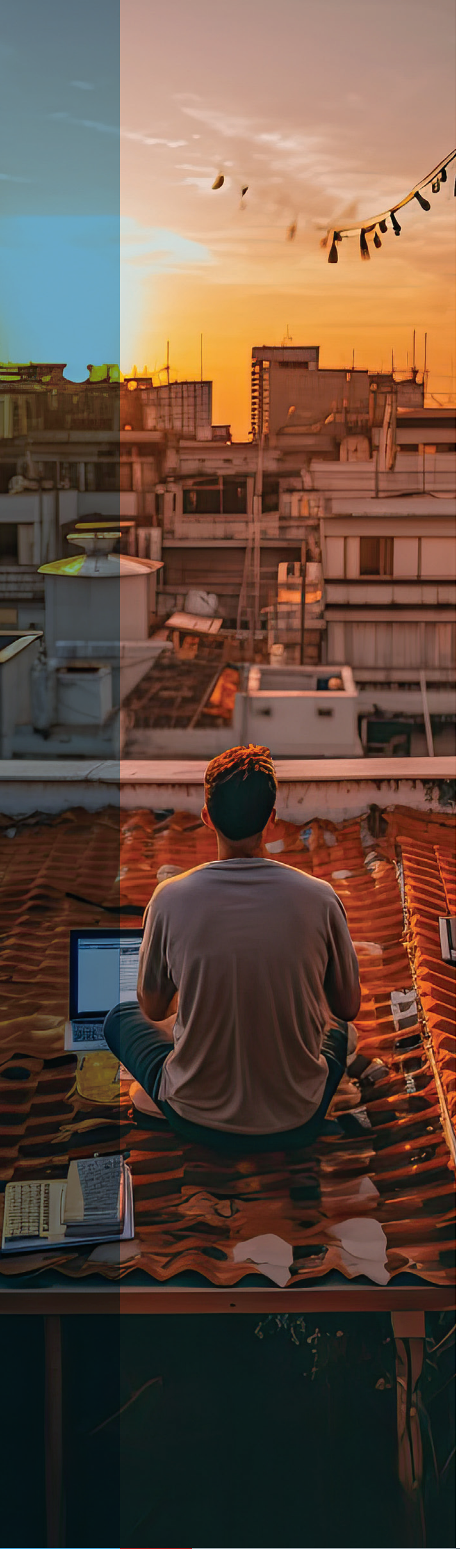


Newland Chase
A CIBT COMPANY

2023 Q2 REVIEW

An examination of the immigration and visa changes in 2023 Q2, and alignment to the CIBT Five Flagships

2023 Q1: An Introduction

As 2023 Q1 saw a world moving away from restrictive mobility due to the global pandemic, with international borders opening, significant trade and travel corridors being utilized in ways they hadn't seen since 2019, and concessions in both immigration and visa rules that were inexorably linked to the early stages of a world in pandemic being removed, 2023 Q2 carries on with that trend. We have reviewed over 130 changes in policy, procedure, and process in both immigration and travel against a backdrop of CIBT Newland Chase's five Flagship Themes:

1) Reaction is Inaction: A world in Polycrisis has become an overarching landscape.

2) Abstract is Reality: A world of AI, Digitization and Technology has become an operating landscape.

3) Reset and Renew for Resilience and Relevance: A world of skill, talent and a globalised workforce, together with immigration being used as an economic lever is a relational landscape.

4) Embrace to Demystify: A world of complex simplicity and simple complexity in both rules and procedure has become a dynamic landscape

5) The [Un] Familiar Traveller: A world of changing norms has become a relative landscape.

Interestingly, all of the changes explored (see below) fit into one or more of CIBT Newland Chase's Flagships; and when linked thematically, conclude that the whilst the uncertain world continues, the lessened legacy of Covid has been replaced with other considerations, including a broader public health consideration, political unrest, negative natural world events, and the labour consequences inexorably linked to a world in threat of economic downturn. Indeed, economic considerations play a heavy part in determining how rules are implemented and relaxed, both to revitalize country economies and deal with skills shortages, and in an ongoing war for talent. Inroads in digitization and artificial intelligence are revolutionising the cross-border cycle at pace. We have also seen continuing protectionism, removal of immigration and travel policies that do not suit the evolving economic situation, and a number of burdensome regulations being introduced. But what can we learn from a review of April 2023 to June 2023, and how far is it a continuation of what we witnessed in 2023 Q1, and how much is new? Below forms an 'around the world' update of what has been going on at a governmental and official level as we near the close of 2023 Q2.

THOUGHT LEADERSHIP

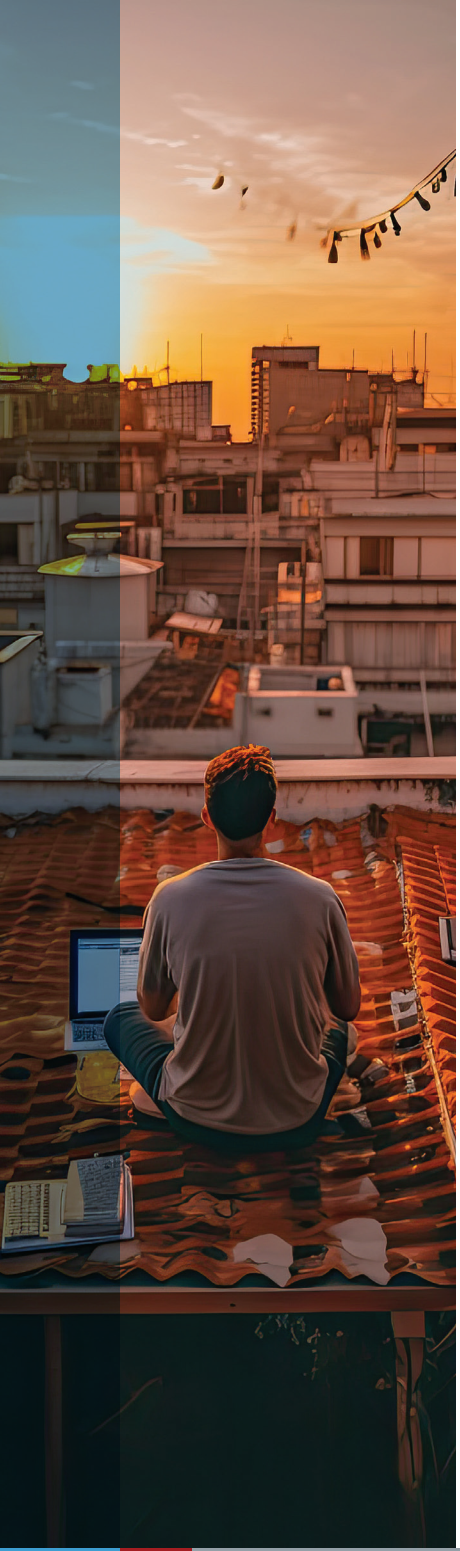
This is the second installment in a four-paper series that reviews over 130 news items, government announcements, and public policy changes and thematically links them to present an immigration and visa global state of play.

Rackham, Ray
Thought Leadership, Advocacy and Public Policy

2023 Q2: The Economic Face of Immigration and Travel

Investor Visas and Digital Nomads

Much has been discussed about immigrant investor programs, which allow individuals to more quickly obtain residence or



citizenship of a country in return for making qualifying investments. Broadly, the programs offer either citizenship by investment, residence by investment, or a hybrid with immediate residence followed by accelerated citizenship. The trend of countries offering such visas has grown exponentially both as a result of the pandemic and pressing economic need.

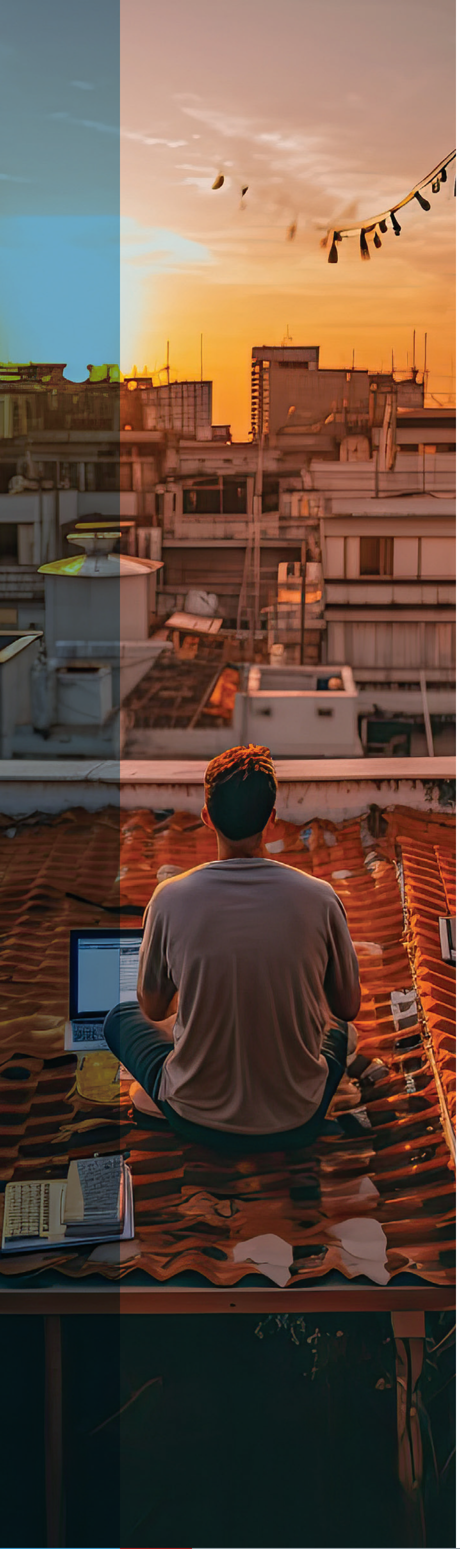
2023 Q1 saw much activity in the world of investment, be it Ireland and Portugal in either curbing or removing their respective programs altogether; or in tweaking their existing rules to meet their own economic needs, as in Singapore, Tanzania, and Greece; or introducing long forgotten residency by investment schemes, as in the case of Hong Kong SAR.

2023 Q2 continues this trend. In April, Bahrain announced the launch of its Golden License, providing Golden Residency permits for investors who can make a $50m investment or execute major investment projects, creating a minimum of 500 jobs in Bahrain. Similarly, Egypt lessened some of the conditions attached to its citizenship by investment program; including provisions reducing the real estate purchase, investment threshold and deposit requirements, whilst the UAE published regulations that clarified simplification provisions that had been implemented in 2022, but required further detail. In June, Nigeria announce plans to introduce a single-entry Business Trust Visa, permitting investors entry to Nigeria for a variety of foreign investment business opportunities.

Saudi Arabia announced simplifications to the entry process for foreign investors, through the introduction of a new dedicated visit visa. Whilst details remain unclear (for example what relationship/sponsorship the individual will require with an existing company in Saudi Arabia), the commitment to a dedicated visa for those who are exploring investment opportunities is welcomed. Greece introduced a new law (coming into effect in January 2024) that creates an Investor Residence Permit. Whilst in Canada, the government of Quebec has published widespread proposals to refresh the presently suspended Quebec Immigrant Investor Program (QIIP), which is expected to reopen next year with a revised suite of regulations

Some countries are taking an alternate approach; continuing to tighten investment programs as a response to a variety of socio-economic issues. In May, Cyprus introduced amendments to more strictly review applications under its Residency by Investment program, introduce higher minimum annual incomes for both main and dependant applicants, and a new annual requirement prove income and maintenance of investment funds. Whilst the Bulgarian golden passport program remains closed, in June Bulgaria approved a legislative change which aims to more strictly regulate the residency by investment program to prevent fraud of process. Furthermore, Portugal confirmed that (as reported in 2023 Q1) whilst its investment visa program will come to an end, those donating to cultural institutions in Portugal will still be eligible to apply, a welcomed clarification. Portugal also confirmed that applications under the program will be accepted until the new law comes into effect.

In May Japan announced plans to attract international digital nomads, through wholesale review of existing visa programs and residence statuses, with a commitment to making it easier for digital nomads to obtain a visa. As part of a governmental strategy to attract 100 trillion-yen ($750 billion) worth of foreign direct investment by 2030, the move looks to promote economic growth at an accelerated rate, and — in the words of Prime Minister Fumio Kishida — "make Japan more open to the world". 2023 Q2 also saw Spain publish additional guidance on documentary requirements



for those applying for International Teleworking visas/permits and Entrepreneurial visas/permits (nomad schemes announced in 2023 Q1, but with limited supporting information). Guidance around the required validation of academic or professional experience in the application process, and the role of the Spanish National Agency of Innovation in supporting certain applications has been welcomed.

A Flex in Rules to Bolster Economy or Fill Skills Shortages

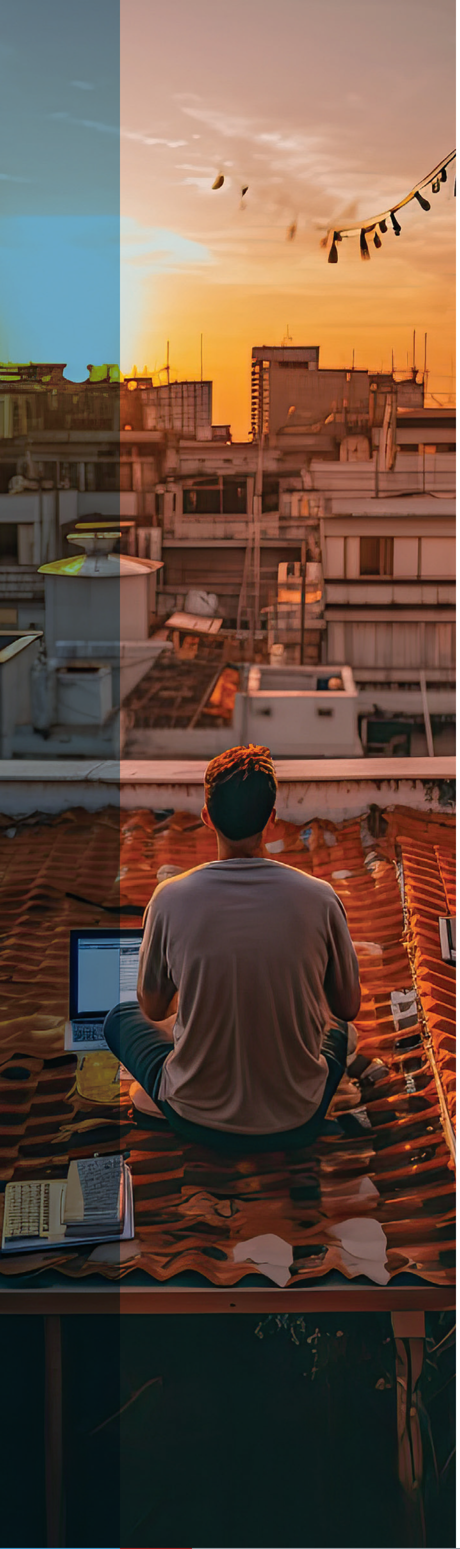
2023 Q2 continues to see international governments relax immigration rules to achieve economic revitalisation as a result of the pandemic and threat of economic stagnation.

Business travel visa economic revitalisation is a growing trend. In April, the European Parliament approved a law that will allow citizens of Kosovo to travel to the EU — and EU citizens to go to Kosovo — without requiring a visa, for periods of up to 90 days in any 180-day period. This visa exemption will enter into force once the European Travel Information and Authorisation System (ETIAS) is in place and in any case by 2024. Importantly, after the law has entered into force, the entire Western Balkans region will have a similar visa framework for the Schengen area. In May, Singapore confirmed that citizens of Saudi Arabia are visa exempt for entry to Singapore for tourist and business purposes. Similarly, Kosovo now permits visa-free entry for up to 90 days within a 180-day period, and Montenegro allows visa-free travel for up to 30 consecutive days, but no more than 90 days in a 180-day period, for Saudi citizens. A number of European countries have agreed to allow certain Gulf Cooperation Council (GCC) nationals to enter their country without a visa. Similarly, in Iraq, GCC citizens are now eligible for two visit visa options for tourism and some business activities, allowing for either 60 days stay or multiple-entry stay for up to one year, instead of the one visa-on-arrival for only 30 days. Georgian citizens are also now visa exempt to enter Russia for tourism or business purposes for up to 90 days in a 180-day period.

In June, Mozambique streamlined the entry processes for business and tourism for citizens of 29 countries (including the Canada, China, Japan, Saudi Arabia, UK and USA) for a visa exempt 30-day

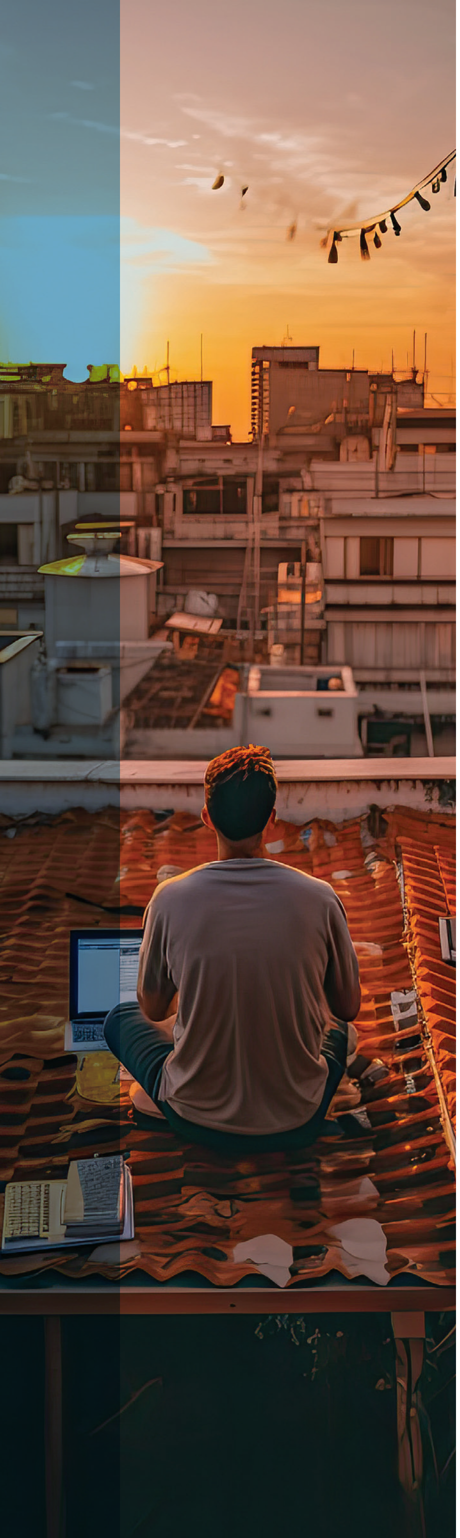
stay. Citizens of the newly visa exempt countries may now travel to Mozambique with their travel documents and pay a processing fee of MZN 650 upon arrival. Also, in June Canada confirmed that citizens of 13 countries (including Panama, Philippines, Thailand, Uruguay and a number of Caribbean countries) to enter without a visa by air for tourism or business if they either held a Canadian temporary resident visa in the last 10 years or if they currently hold a valid United States visa. Travellers can utilize the electronic Travel Authorization program, like other visa-exempt nationals. As of June 16, Ireland confirmed that previously-required additional application forms (which requested information that went beyond that which is usually requested) are no longer required for visa applications filed in India.

In a world where there is constant threat of compliance consequences in the blurring of travel and work, in Denmark proposals were drafted in May to allow foreign travellers the ability to work in Denmark for two periods of up to 15 days each in a 180-day period. This is, at present, only a proposal, and would need to be ratified into law; but the proposal goes into detail as to possible eligibility requirements (for example, the traveller would need to be company has an entity in Denmark that employs 50 people). However, slight a possibility, this is particularly welcomed, as in 2023 Q2 a number of



EU member countries, including Denmark (and notably Belgium), have ramped up on-site immigration inspections. In April, at least 14 UK contractors were removed from one company site by local immigration officers, and were arrested on the grounds that they lacked the required visas and immigration paperwork to perform their temporary duties legally in that location. This resulted in a Schengen travel ban of two years. In June Morocco launched a short-term work authorization which allows foreign nationals to conduct what would previously be considered employment activities for a Moroccan employer for up to three months. The new authorization will make it easier for foreign nationals to perform urgent, short-term work across all occupations for an employer in Morocco, where they are not able, or do not have the time, to adhere to the administrative requirements that are requirement under other immigration statuses. Employers should seek this route with caution, and always consult experts as to eligibility, to avoid any potential compliance pitfalls.

In the world of work, skills shortages remain top of the international agenda. With recent studies indicating as much as an 85m human capital deficit by 2030, the immediacy of the mid-pandemic 'great resignation' taking its toll on current workforce demand planning, and the countries attempting to attract top talent to fill skills gaps; many countries have introduced changes enhance speed to ground for skilled workers. In April, Singapore released information concerning its Complementarity Assessment Framework (COMPASS) system, which will replace existing rules with a points-based evaluation system for initial Employment Pass (EP) applications in September 2023. Whilst confirming that COMPASS will award points based on qualifications and salary, there will also be bonus points for both positions listed on the Shortage Occupation List and for companies aligned to the country's Strategic Economic Priorities. Canada made a number of positive changes to the Temporary Foreign Worker Program, to tackle labour and skills shortages throughout the country. These included tripling the percentage of total workforce to be hired under the program in certain sectors (including accommodation and food services, constructions, and food manufacturing) and extending the validity of approvals for up to 18 months. Canada also announced new measures to streamline family reunification processes to help families reunite more quickly and as a strategic means to tackle labour and skills shortages; and identified the types of individuals (i.e. French speaking, or those working in STEM occupations) who would be invited to take part in the Express Entry scheme for permanent residence, again to respond to Canada's changing economic and labour market needs. In Poland, it was announced the applicants would soon have relaxed pathways to demonstrating Polish language (expected by close June) and speed up application timeframes; and in Austria, it was confirmed that skilled workers with proficient B1 language in French, Spanish, Bosnian, Croatian and Serbian will now receive five extra points under the Red White Red Card points system. In Denmark, a number of amendments were made to the Danish Aliens Act, including relaxed Fast Track scheme rules for eligible employers, and lengthening automatic jobseeker permits for foreign nationals with a Danish degree. The Department of Home Affairs of South Africa relaxed health and policy clearance certification requirements foreign nationals who are applying for a temporary residence visa or permanent residence permit, lessening the documentary gathering period and increasing speed to ground; and launched a consultation on the piloting of a



Trusted Employer Scheme, which aims to reduce administrative requirements and introduce shorter processing times for certain eligible employers operating in areas of national strategic importance. China launched a pilot (across several major cities including Beijing, Chongqing and Shanghai) which relaxed application requirements and expanded the list of work permit eligible highly skilled and urgently needed foreign experts. In May, Australia announced reforms to the short-term Temporary Skill Shortage (TSS) applicants, including an expanded employer-sponsored permanent residency pathway and removing limits on those who can apply without having to leave first; together with addition of 190,000 permanent migration spots in 23/24, and the budgeted onboarding of 500 case officers to expedite visa processing. May also saw the welcomed news that Kuwait has resumed processing work permit transfers and renewals for certain foreign nationals over the age of 60, removing a complete ban on work permit renewals or transfers for those who are over 60 years old and hold only a secondary school certificate or lesser education, in place since 2020. In June, Hong Kong SAR more than quadrupled its Talent List from 13 to 51 professions to meet socio-economic needs and attract greater numbers of highly-skilled talent.

But it isn't just about relaxation of rules. 2023 Q2 saw active steps by many governments to rethink the nature of immigration as a means to extend trade collaboration at a bilateral level. The first post-Brexit trade deals between the UK and Australia and New Zealand, respectively, came into force on May 31. Citizens of Australia and New Zealand may now benefit from certain exemptions and relaxations if they are seeking to enter the UK either as Expansion Workers or Service Suppliers under the UK's Global Business Mobility routes. Accordingly, Australia implemented the previously reported labour market testing requirement exemption for UK citizens and permanent residents seeking to work in Australia under Temporary Skill Shortage work visas. Additionally, both the UK and Australia have increased the age limit under their respective youth mobility/working holiday maker programs (up from 30 to 35 years old). In May, Australia and India signed a Migration and Mobility Partnership Agreement to promote the mobility between the two countries, extending the ability for Indian students graduating in Australia to live and work beyond their studies and (in a move similar to the agreements entered into by the UK and India in the 2023 Q1) providing 3,000 places for early professionals of Indian origin in energy and technology sectors. Also, in May, Canada and Finland confirmed that a Youth Mobility Agreement that will come into effect in 2024, allowing for Canadian and Finnish citizens aged 18 to 35 to be able to travel and work for up to 12 months. In June, the UK and Switzerland signed post-Brexit agreements to recognize professional qualifications in both countries, where individuals working in regulated fields in each country will have a simpler and more relaxed mechanism to have their professional qualifications recognised.

Conclusions

The world of immigration and visa policy continues to be a mass of contradictions; as the world readjusts to the ecosystem of 2023. At the end of 2023 Q2, and now halfway through the year, swathes of relaxations of the rules to revitalize economies and deal with skills shortages still sits alongside continued attempts to protect the local labour and enforce penalties for non-compliance of rules, many of which are changing rapidly. Countries are using both increasingly opening, and increasingly closing borders as a means to address the socio-economic and socio-political issues of the now and the tomorrow. Accelerated technology advancement, particularly in digitization, continues to disrupt, drive and develop; impacting the cross-border cycle in new ways and possibly leading to a more streamlined, consumer led discourse between applicant and authorities. Economically revitalised and challenged countries will continue to adapt the way they operate to meet new demands, ever-changing priorities and needs. It will be interesting to see how far the themes explored above extend into 2023 Q3 and beyond, and importantly which countries will appear in our next review.