4 Movement of people

Movements of people play an important role in the integration process of the Union for the Mediterranean region, given their potential to be an engine of economic and social development at the regional and the national level. This chapter investigates the evolution of mobility of persons in the Union for the Mediterranean (UfM) region in recent decades, with a special focus on migrations and how legal and institutional frameworks on migration facilitate cross-border mobility and the socio-economic integration of migrants.

Key takeaways

- Movement of people is an important driver of economic and social development, and has been recognised from the outset of the Barcelona Process in 1995 as a key component of integration in the Union for the Mediterranean region.
- Since 1995, countries have taken important steps to facilitate movement of people in the UfM region, including easing visa requirements and signing bilateral and/or regional agreements on labour and education mobility. However, progress achieved in terms of free circulation of people, including South-South movements, has been unequal across countries in the region.
- Migrations are an important form of movement of people in the UfM region. While the number of intra-UfM migrants almost doubled over the past 25 years to reach 37 million people in 2019, patterns of migration have been relatively stable and the centrality of the EU in migration flows remains.
- Since the early 2000s, the EU has looked at schemes of circular migrations as a way to address both labour market needs in destination countries and sensitive issues linked to the permanent settlement of migrants. The design of circular migration programmes has been driven by a “triple win” narrative for origin and destination countries as well as migrants themselves, but their implementation has often been detrimental to migrants’ rights and working conditions, especially in the case of low-skilled, seasonal workers in sectors such as agriculture or construction. To address these shortcomings, countries should review the design of circular migration schemes to put migrants’ rights at the centre and ensure the attractiveness of circularity for all parties – origin and host countries, employers, and migrants.
- Recent years have seen a nascent trend of mobility schemes targeting new categories of migrants including tertiary education students and young, highly skilled professionals. The scope of existing schemes is still limited, and there are structural challenges linked to youth employability in the Mediterranean region; these constitute barriers to unlocking the full potential of mobility patterns in the region. Enhanced cooperation between countries within the framework of Skills Mobility Partnerships will allow the development of sustainable mobility schemes that also support returning migrants in re-integrating with the labour market in their origin country.
- Addressing the question of youth employability is crucial to diversifying patterns of migration in the UfM region. Policies aimed at increasing the quality of education systems and labour market opportunities in Southern Mediterranean countries, combined with programmes focusing on skills development and transferability, can play a key role in fostering greater integration of non-EU countries in labour- and education-related mobility patterns in the region.
- The availability of high-quality and comparable data is crucial to efforts to monitor movement of people in the UfM region. Important gaps remain in this regard, in particular in the Southern Mediterranean and Balkan sub-regions. Moving forward, countries should give particular attention to strengthening their capacity for migration-related data collection and dissemination. As circular migration schemes are implemented in the region, specific indicators could be developed relating to the number of programmes implemented and/or the number of individuals migrating within the framework of such programmes.

Introduction

Movement of people as a driver of economic and social development

The importance of mobility of people has been recognised from the outset of the regional integration process in the Mediterranean. The socio-cultural pillar of the Barcelona Declaration (1995) mentions “the importance of the role played by migration in [the] relationships” between participant countries. In line with the Valletta Declaration on Strengthening Euro-Mediterranean Cooperation through Research and Innovation (2017) and the Union for the Mediterranean (UfM) Roadmap for Action, the UfM currently aims to contribute to implementing the Migration and Development approach, placing at its heart issues related to youth employability, education, women’s socio-economic empowerment, and job creation (UfM, 2017[1]).

Human mobility is a significant driver of economic and social development at both the regional and national levels, and facilitating it often constitutes a primary or secondary goal of regional integration processes, whether formal or informal. The UfM region has a longstanding history of hosting dynamic flows of people across both shores of the Mediterranean, which has been determinant to the region’s development throughout the centuries.

The UfM region is characterised by a variety of economic situations and social, cultural and demographic attributes driving multiple forms of movements of people. These can be classified into two main categories of mobility:

- Migration, in which a person *settles* in the country of destination, whether temporarily or permanently. This category encompasses different motives of migration, such as labour migration, family migration, and migration for education purposes.
- Travel, a form of mobility that does not involve settlement in the country of destination. This category encompasses tourism, as well as some forms of business-related mobility or student and/or research mobility (e.g. attending a conference).

Migrations in particular can play a key role in achieving deeper economic integration of the UfM, both within the Southern Mediterranean and Western Balkans sub-regions and with the European Union (EU), whether from the perspective of host countries or countries of origin (see Box 4.1 for the definition of migration).

Migrants may positively contribute to the economies of their country of origin through several channels. Literature on the benefits of migration for sending countries has mainly focused on financial flows from migrants (e.g. remittances and investment). On average, remittance inflows represent 10.4% of gross domestic product. (GDP) in the Western Balkans and 7.8% in the Southern Mediterranean, two major sub-regions of origin in the UfM (see Chapter 2). Migrations support greater integration of countries within regional and global networks by creating links between people and businesses from origin and host countries. Migrants also contribute to transferring back knowledge, skills, and capital, which can support enterprise development in countries of origin. Mobility of highly skilled labour in particular can enhance countries’ integration in global knowledge flows and markets, thereby driving innovation and competitiveness (OECD, 2004[2]). Finally, although less easily measurable, a recent and growing literature investigates the social and political role and impacts of migrants on their countries of origin (Fargues, 2017[3]).

At the same time, by filling labour market gaps in their host countries, migrants contribute to completing and complementing the labour force. In low-wage and low-skilled sectors, migrants can fill needs for which the supply of native labour force has been reduced due to increased educational attainment or lack of attractiveness of certain types of jobs. In high-skilled industries, such as information technology, where demand for labour is growing rapidly, migrant workers can help drive innovation while increasing the availability of skilled human capital (OECD, 2004[2]). These dynamics, if managed effectively, can contribute to improving labour market efficiency in destination countries.

Empirical evidence suggests that the main costs for countries of origin related to emigration concern labour shortages and possible losses of human capital (OECD, 2016[4]).

Box 4.1. Migration: definition and measurement

The definition of the term *migrant* set out in the 1998 Recommendations on Statistics of International Migration of the United Nations Department of Economic and Social Affairs (UN DESA) is the most widely accepted. It defines an international migrant as any person who changes his or her country of usual residence, distinguishing between “short-term migrants” (those who have changed their countries of usual residence for a period between three months and one year) and “long-term migrants” (those who have done so for at least one year).

According to the OECD, there are two types of migration:

- *Permanent*-type migrations apply to individuals who have been granted the right to permanent residence upon entry in a foreign country as well as those admitted with a permit of limited duration that is more or less indefinitely renewable. Different categories of entry may fall under this scope (labour, family, humanitarian, migrations under free mobility agreements).
- *Temporary*-type migrations involve individuals who enter a foreign country on a permit that is either not renewable or renewable on a limited basis only. This excludes tourist and business-related mobility, as well as irregular migration (unauthorised movement of people)*.

In operational terms, migrant-related definitions are informed by geographic, legal, political, methodological, temporal and other factors; that is to say, countries may apply different criteria to identify international migrants. This hinders full comparability of migrant data at the global level. Also, an important challenge in applying the definition of international migrant concerns people who maintain two or more residences in different countries in a given year, such as workers who live away from home for a certain period of time each year, as well as seasonal workers who cross borders in a circular way i.e. circular migration typically involves both return to the country of origin and repeated moves to the destination country. This implies that international migrant statistics may fail to capture certain categories of short-term migration.

Data on stocks and flows of international migration are important to understand and monitor migrant patterns and trends (however defined). The chapter draws upon current statistical sources compiled by UN DESA, Eurostat, OECD and ILOSTAT. UN DESA estimates of migrant stock cover most countries of the world and all countries in the UfM region since 1995; these data, in principle, also include refugees as reported by UNHCR and the UN Relief and Works Agency for Palestine Refugees in the Near East.

The analysis does not compare data across databases (unless specified). This, however, still entails possible discrepancies from aforementioned differences in concepts, definitions and methodologies used in national statistics. Readers are encouraged to refer to primary sources cited in this chapter for information on specific definitions underlying data.

* *Irregular migration* is defined as “movement of persons that takes place outside the laws, regulations, or international agreements governing the entry into or exit from the State of origin, transit or destination” (IOM, 2019[5]).
Source: (OECD, 2020[6]), (UN DESA, 2019[7]), (UN DESA, 1998[8]).

A highly heterogeneous region with different propensities to migrate

There are different migration patterns in the UfM region. In particular, the diverse paces at which countries are transitioning towards an ageing population affect their propensity to migrate – and, thus, their position in migration stocks and flows (as either a sending or a receiving country). The existing literature has shed light on the interaction between demography and migration, whereby migration flows from developing countries to developed countries are linked to a fast-growing working-age population in sending countries contrasting with a stagnating, and even shrinking, one in receiving countries (Fargues, 2011[9]).

In the UfM region, the increasing age imbalance in EU labour markets, with growth of retirees outpacing that of the working-age population, has created a space for immigration towards the EU to fill the gaps in the labour market.

By contrast, in the Southern Mediterranean sub-region[1], the number of new entrants to the labour markets is still increasing every year. UNICEF estimates that, at the current pace, by 2030, 39 million additional youth will arrive on the labour market across the region (UNICEF, 2019[10]). This results in important labour market frictions whereby the labour market is unable to provide enough employment opportunities to absorb the increasing labour supply. The Middle East and North Africa (MENA) region[2] already has the highest youth unemployment rate worldwide, at 29% in North Africa and 25% in the rest of MENA (ibid). Lack of capacity to generate sufficient employment opportunities to respond to the needs of a growing working-age population constitutes a major driver of emigration from these countries.

The situation in the Western Balkan countries is notable. Large-scale emigration following the break-up of Yugoslavia and the subsequent conflicts in the region during the 1990s, combined with decreasing fertility rates, have contributed to a rapidly ageing population – and even, for most countries, a process of depopulation. However, this has not yet translated into a shift in the migration profiles of Western Balkan economies, which remain dominated by the emigration component. This is most likely due to persistently high levels of unemployment, which reached 20.8% in Bosnia and Herzegovina in 2018 (Šabić and Kolar, 2019[11]). As in the Southern Mediterranean sub-region, unemployment continues to drive significant outward migration flows. This is also true in a number of Eastern European EU countries – Romania, for example – although the present analysis does not cover intra-EU migration flows.

Countries' economic development also affects propensities to migrate. Much consideration has been given to wages and national per-capita income as important drivers of labour migrations. An important share of the literature suggests that, as countries experience social and economic development, propensity to migrate among low- and medium-educated migrants follows an inverted U-shaped curve (the notion of a "migration hump" was developed by Martin and Taylor in 1996). This implies that, for relatively poor sending countries, economic growth initially increases propensity to migrate; however, once a certain national income threshold is reached, propensity to migrate decreases as people are sufficiently well-off not to have to emigrate. In the case of Southern Mediterranean countries, most have not yet reached this income threshold. Moreover, the region's economic development in recent decades has been accompanied by an increasing wage differential with the more advanced economies of the EU, which has played a role in increasing migration pressures (Martín Iván, 2009[12]).

Beyond demographic and labour market considerations, regional geopolitical developments and the political and social instability in some Southern Mediterranean countries constitute an important driver of forced migrations in the UfM region. The repercussions of the Arab Spring and the ongoing conflicts in Syria, Libya and Iraq have created important migratory pressures towards neighbouring countries and beyond. In particular, the recent refugee crisis that resulted from the war in Syria, which left 6.6 million people living in displacement by the end of 2019, has affected migration patterns in the region, by significantly increasing the overall stock of migrants in UfM countries (in particular the stock of migrants from all countries of origin compared to intra-UfM migrants, as shown in Figure 4.1, but also by potentially redirecting labour migration flows due to the additional pressures created by the large influx of refugees on labour markets in host countries (see Box 4.4 later in this chapter on immigrant integration in Jordan in the context of the refugee crisis). However, while this phenomenon is sadly an important aspect of movement of persons in the UfM region, it falls beyond the scope of the present analysis on movement of people and regional integration, and will therefore not be covered in this chapter.

Finally, it is worth noting that the mobility of people depends not only on macro-level economic, demographic and political considerations, but also on subjective considerations linked, for instance, to willingness to move (see the section on Indicator M1).

The remainder of this chapter is divided into two parts. The first examines efforts to monitor progress in the mobility of persons, while the second addresses current efforts to enhance mutually beneficial cross-border mobility and suggests policy options for the future.

Monitoring progress in mobility of persons

There is no standard measure of mobility of persons across countries, although stocks and flows of migrants, as well as tourism flows are most often used in the literature. In the context of regional integration in the UfM, based on the aforementioned limitation on data availability, this chapter considers a set of indicators on movement of people as presented in Table 4.1. Indicator M1 relates to enhancing migrations in the region, and includes considerations for improving integration outcomes of migrants in destination countries. Indicator M2 covers one of the necessary pre-conditions for facilitating mobility in the region. Indicator M3 considers the contribution of tourism to the economies of the UfM region. Finally, Indicator M4 relates to improving regional cooperation on migration.

Table 4.1. Key monitoring indicators of movement of people

	Description	Coverage	Frequency
Indicator M1. Number of migrants and migrant-to-population ratios	It measures how many UfM emigrants migrate to another UfM country and how many immigrants host the respective countries from other UfM countries, with a view to showing the actual mobility within the region from both an origin and a host-country perspective. Source: UN DESA International Migrant Stock database https://www.un.org/development/desa/pd/content/international-migrant-stock	All UfM member states	Five years, last available year 2019
Indicator M2. Visa requirements	It measures visa policies that hinder or facilitate different types of movement of people across countries. Source: Henley & Partners Passport Index, 2020 https://www.henleypassportindex.com/	All UfM member states	Annual, last available year 2020
Indicator M3. Contribution of tourism to GDP and employment	It measures the relevance of the travel and tourism sector to countries' economies in terms of direct and indirect contribution to employment and GDP. Source: World Travel and Tourism Council, 2019; https://wttc.org/Research/Economic-Impact/Data-Gateway Eurostat, 2018	All UfM member states	2000-19

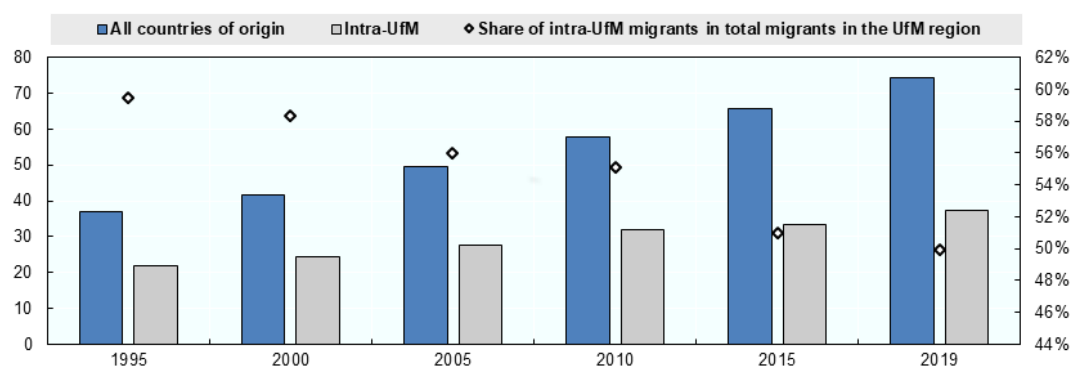
	Description	Coverage	Frequency
Indicator M4. Bilateral and regional agreements between UfM countries	This indicator adds to the quantitative analysis by discussing selected agreements and legal frameworks, which are important for management of migrations, and labour and education mobility. Source: International Organisation for Migration	EU27, Egypt, Jordan, Mauritania, Morocco, Tunisia	

Indicator M1. Number of migrants and migrant-to-population ratios

The increase in regional migrants has been evident over time – both numerically and proportionally. In 2019, the stock of international migrants in UfM countries reached 74 million persons, up from 38 million in 1995 (Figure 4.1). The significant increase in migrant stock in the region in the 2010s was driven not only by migrations within free-movement areas, but also by humanitarian migrations resulting from the Syrian refugee crisis. Among all international migrants in the UfM, roughly one-half originated from other UfM countries (intra-UfM migrants). The share of intra-UfM migrant stock in total migrants, however, has been shrinking since 1995 due to the increasing number of immigrants to the UfM originating from extra-UfM countries. In terms of migrant-to-population ratios, intra-UfM migrants constitute an increasingly important share in the total population in the region, up from 3.2% in 1995 to 4.5% in 2019 (.(Figure 4.3) This was higher than the ratio of international migrants to the global population in 2019 of 3.5% (IOM, 2019[5]).

Figure 4.1. Migrants in the UfM, 1995-2019

Numbers of migrants and share of intra-UfM migrants in total migrants in the UfM region



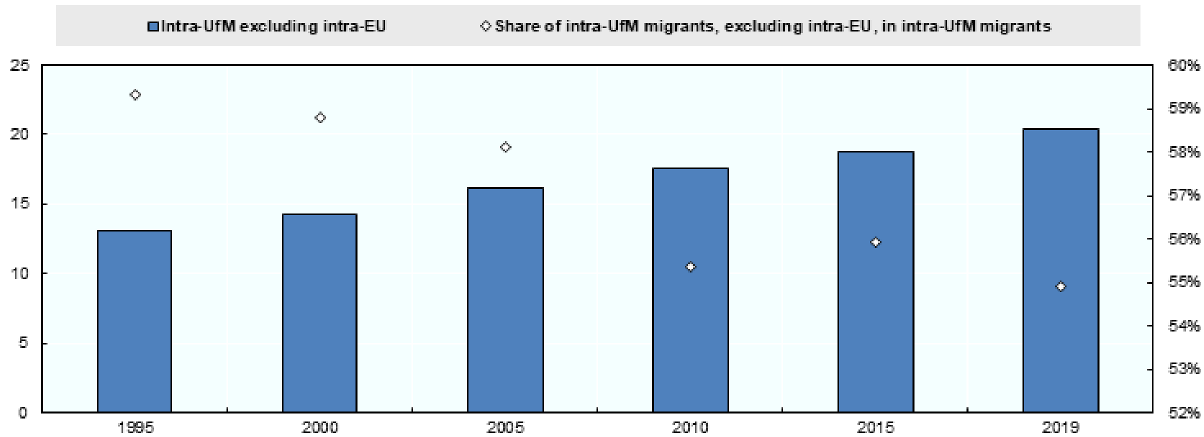
Note:Data for UfM include all member states. Data on migrants of all countries of origin include Syrian refugees. Intra-UfM data exclude Syrian migration.
Source: Authors calculation based on UN DESA (2019) International Migrant Stock (database), https://www.un.org/en/development/desa/population/migration/data/estimates2/estimates19.asp.

StatLink https://stat.link/m3i0qn

Intra-UfM (excluding intra-EU) migrant stock rose to 20 million in 2019, up from 13 million in 1995 Figure 4.2. Although the size of the migrant stock (excluding migrants who move within the EU) has been increasing constantly over time, its share in total intra-UfM migrant stock has decreased since 1995. This is due to the progressive expansion of the EU membership, which makes the free movement of people within the EU a key driver of the growth in the migrant population.

Figure 4.2. Intra-UfM migrants excluding intra-EU migrants, 1995-2019

Number of intra-UfM migrants (excluding intra-EU) and share of intra-UfM migrants (excluding intra-EU) in total intra-UfM migrants

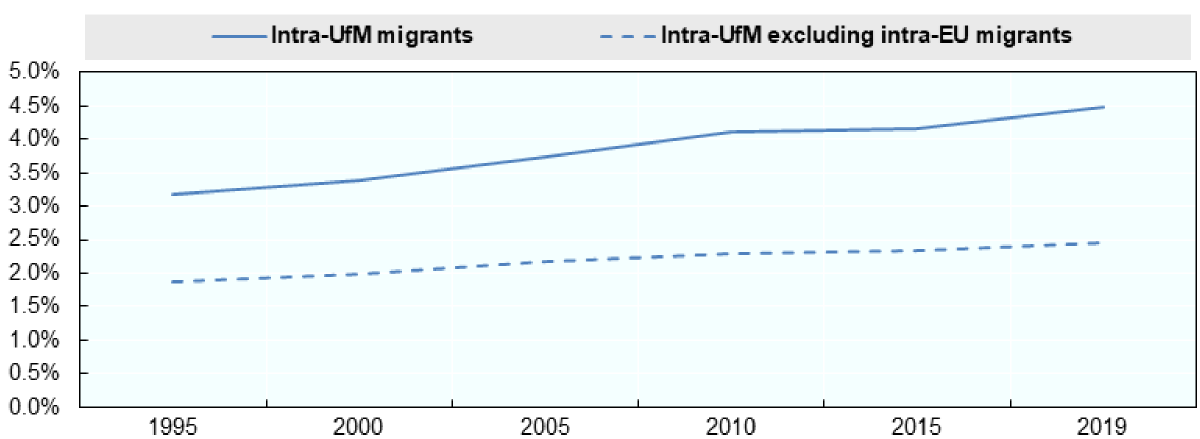


Note: Data for UfM include all member states. EU refers to EU27 member states.
Source: Authors' calculation, based on UN DESA (2019), *International Migrant Stock* (database), https://www.un.org/en/development/desa/population/migration/data/estimates2/estimates19.asp.

StatLink https://stat.link/ue4s0m

Figure 4.3. Migrant shares of populations, 1995-2019

Shares of migrants as percentage of total populations in the UfM region



Note: The population size used to calculate the percentage of immigrants and emigrants is based on the UN DESA total resident population of the country, which includes foreign-born populations.
Source: Authors' calculation, based on UN DESA (2019), *International Migrant Stock* (database), https://www.un.org/en/development/desa/population/migration/data/estimates2/estimates19.asp

StatLink https://stat.link/qmn4s1

There have been minor evolutions in migration patterns in the Mediterranean region over the past decade(s), including the emergence of new destinations for labour emigrants from Southern Mediterranean countries in response to the tightening of migratory policies and the effects of the financial crisis in Europe. Nonetheless, EU countries continue to play a central role in intra-UfM labour migrations. Studies report that 91% of the increase in emigration from Southern Mediterranean countries between 2001 and 2010 was directed to Europe (Bardak, 2015[13]). In the following period (2010-17), approximately 400 000 people emigrated annually from Southern Mediterranean countries to Europe using legal pathways (Alcidi, 2019[14]). In 2019, the EU27 countries delivered just over 320 000 first permits to nationals of Southern Mediterranean UfM countries (Eurostat, 2020[15]).

Migration from and to European Union countries

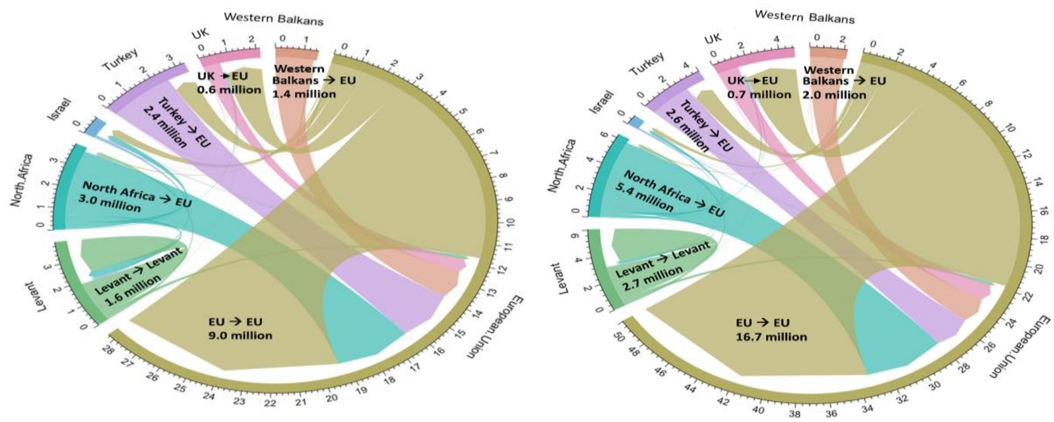
As mentioned, the EU plays a central role in the movement of people in the UfM region. This is not only because the EU, as a sub-region, takes the lion's share of intra-UfM migrants, but also because most migration from the extra-EU countries flows towards the EU (Figure 4.4). In 2019, there were around 5.4 million emigrants from North Africa (Algeria, Egypt, Mauritania, Morocco and Tunisia), 2.7 million from the Levant (Lebanon, Jordan and Palestinian Authority), 2.6 million from Turkey, and 2 million from the Western Balkans (Albania, Bosnia and Montenegro) living in an EU country (Figure 4.4). These numbers accounted for 19%, 9.1% and 7.1% of all immigrants in the EU, respectively. It is worth noting that the number of emigrants from North Africa to the EU has almost doubled since 1995. A relatively small increase in migrant stock can be observed in 2010-15 compared to other periods, resulting from a moderate increase of immigrants from both within the EU and North Africa (Figure 4.5.A). This is partly due to the EU's gradually tightened migration policies, which now tend to prioritise selective or chosen immigration aimed at meeting skilled labour needs; this has limited the number of migrants from outside the EU (Idrissi and Moufti, 2019[16]).

The major sending countries of immigrants in the EU remained largely unchanged, although their rankings fluctuated from year to year. Morocco, Turkey and Algeria are the largest extra-EU sending countries, with 2.7, 2.6 and 1.7 million immigrants in the EU originating from these countries in 2019, respectively (Figure 4.5 B) However, Albania and Bosnia and Herzegovina outnumbered other countries in terms of proportion of migrants to population, as around 30% of the populations born in these two countries lived in the EU in 2019. Tunisia has also been an important migrant-sending country in the UfM region, with 5.3% of its population residing in the EU in 2019.

The number of emigrants from the EU living in non-EU countries in the UfM has remained much less significant than the immigrant population the sub-region absorbed, although it increased steadily in the 1995-2019 period (Figure 4.5.A). As a matter of fact, the large majority of UfM emigrants from the EU lived in another EU country due to the free movement of people policies in the region. Turkey has been the largest extra-EU country to receive EU emigrants since 1995 (Figure 4.4).

Figure 4.4. Migrant stock in the UfM by region/country of origin and destination, 1995 and 2019

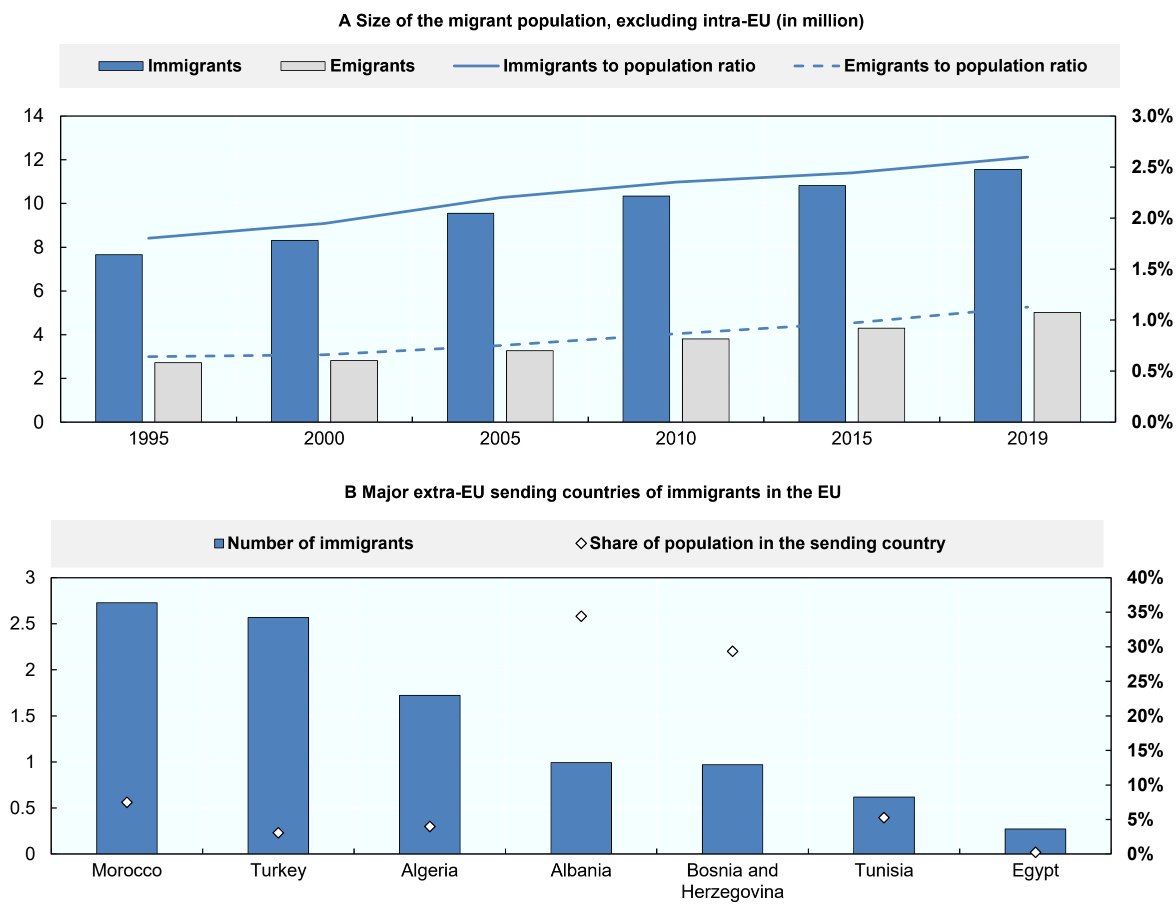
Numbers (millions) of intra-UfM migrants by sub-region/ country of origin and destination



Note*:* Each sub-region/country is represented by a coloured fragment along the circumference of the circle. Arcs between fragments show migration stocks, with the direction of arrows indicating the direction of flows. The thickness of the arcs is proportional to the significance of the stocks. For example, in 1995, 3.0 million emigrants from North Africa lived in the European Union. EU includes EU member states as of September 2020.

Source*:* Authors' calculation, based on UN DESA (2019), *International Migrant Stock* (database), https://www.un.org/en/development/desa/population/migration/data/estimates2/estimates19.asp.

Figure 4.5. UfM immigrants to and emigrants from the EU, 1995-2019



Note: "Immigrant" refers to people born in a UfM country other than the EU and residing in a country within the EU. "Emigrant" refers to people born in a country within the EU and residing in a non-EU country in the UfM region. The population size used to calculate the percentage of immigrants and emigrants is based on UN DESA data for total resident populations of countries, which includes foreign-born populations. In both panels, percentages of population show ratios of EU immigrants to EU population and of EU migrants to EU population.
Source: Authors' calculation, based on UN DESA (2019), *International Migrant Stock* (database),https://www.un.org/en/development/desa/population/migration/data/estimates2/estimates19.asp.

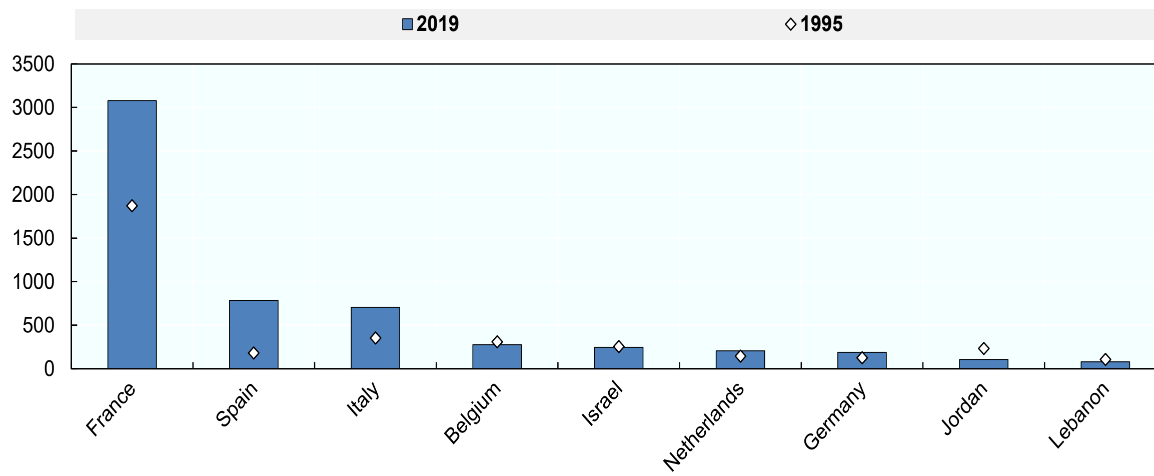
StatLink https://stat.link/qau5on

In 1995-2019 North Africa was a major region sending migrants to other UfM countries, notably to the EU (Figure 4.6) with emigrants from Morocco and Algeria constituting almost 80% of the sub-regional emigrant population. The number of emigrants grew from 3.7 million in 1995 to 6 million in 2019. Emigrant-to-population ratios remained rather stable, averaging 3% in the period 1995-2019.

Countries of destination for North African emigrants have slightly diversified over the past two decades. Although France remains the most important destination for North African emigrants due to historical ties (1.9 million in 1995 and 3.1 million in 2019), Spain and Italy have witnessed significant increases in receiving North African emigrants since 1995. In 1995-2019, North African migrants in Spain have more than quadrupled, and doubled in Italy (Figure 4.6). Other EU countries such as Sweden, Finland and Luxembourg have increased their number of North African migrants by 3 times, 4 times and 11 times in 25 years, although they remain a small population in these countries (respectively 29 812, 7 041 and 4 776 in 2019). It is noteworthy that migration from the North African countries to some other Southern Mediterranean countries has become less important over time. This is the most visible for Jordan, which has seen a declining number of emigrants from North Africa, notably from Egypt.

Figure 4.6. UfM countries hosting the largest numbers of North African emigrants

Numbers of North African emigrants per country (thousands)



Source: Authors' calculation, based on UN DESA (2019), *International Migrant Stock* (database), https://www.un.org/en/development/desa/population/migration/data/estimates2/estimates19.asp.

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The immigrant population in North Africa is much less significant than the emigrant population, although it slightly grew from 0.2 million to 0.3 million in 25 years. The Levant has been the largest area of origin for immigrants in North Africa, with the Palestinian Authority as an important source of migration. France has been the second largest sending country, with the number of migrants moving to North Africa from France having more than doubled in 1995-2019, most likely driven by the return-migration phenomenon. Some members of the North African diaspora (i.e. born in France to immigrant parents) are choosing to migrate to their parents' country of origin due to cultural ties. Algeria, Morocco and Tunisia are also noteworthy destinations for retirees' migration from France.

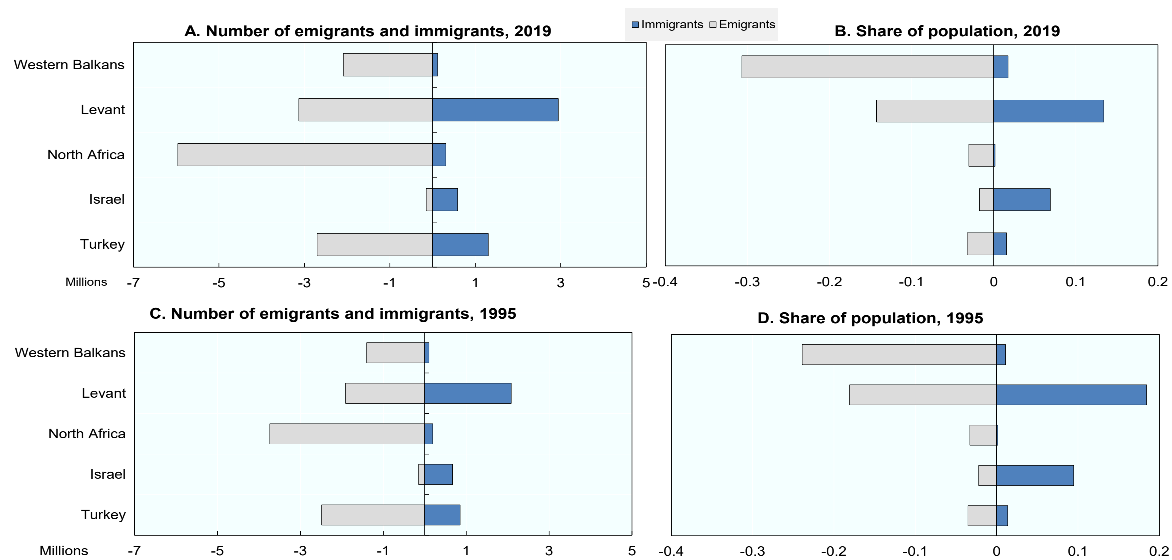
The Western Balkans faces similar challenges as North Africa with regard to negative net migration (Figure 4.7). The sub-region has been experiencing massive emigration for decades, notably from Albania and Bosnia and Herzegovina. In 1995 and 2019, the emigrant-to-population ratio in the Western Balkans increased from 18.5% to 30.7%, highest among all sub-regions in the UfM. 96.7% of them moved to a neighbouring EU country, such as Italy, Greece or Croatia. Meanwhile, although the immigrant stock in the Western Balkans has increased in recent decades, the share of immigrants relative to the population has remained low (2%), especially compared to its large emigrant population. The majority of immigrants from Bosnia and Herzegovina lived in Montenegro.

Lack of attraction for immigrants, compounded with high levels of emigration (especially of working-age population) has resulted in a decrease in population and workforce in the Western Balkans. Continuous efforts have been made to encourage migrants or emigrants to return.

In contrast to the trends followed by other sub-regions, migration in the Levant takes the predominant form of intra-regional migration (Figure 4.7), with a large size of forcedly displaced Palestinians in Jordan and Lebanon as a main driverJordan alone hosts 2.2 million Palestinian refugees registered with UNRWA in 2018. The Syria refugee crisis severely affected migrations in the Levant by forcing roughly 120 000 Palestinian refugees to flee Syria to Lebanon and Jordan, as well as to Turkey and beyond (UN, 2019[17]). In 2019, among the 2.9 million UfM emigrants residing in the Levantine sub-region, 2.6 million were Palestinians. For the same reasons, emigrant- and immigrant-to-population ratios have been constantly high in the Levantine sub-region, figuring 13.4% and 14.3% in 2019 (Figure 4.7), albeit both decreasing since 2005 (Annex 4.A).

Turkey continues to be both a sending and receiving country for migrants in the region, although its immigrant population has grown faster than its emigrant population since 1995.

Figure 4.7. UfM emigrants from and immigrants in non-EU sub-regions/countries, 1995 and 2019



Note: Immigrants" refers to foreign-born persons residing in the country. "Emigrants" refers to people born in the country who were residing outside their country of birth in 2019.
Source: Authors' calculation, based on UN DESA (2019), *International Migrant Stock* (database), https://www.un.org/en/development/desa/population/migration/data/estimates2/estimates19.asp

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South-South migrations in the Southern Mediterranean

Although a relatively minor phenomenon compared to migrations involving the EU, it is noteworthy to look at South-South migration flows in the UfM region. Several Southern Mediterranean countries have a longstanding tradition of migrations for work purposes within the region, including Egypt, Jordan and Lebanon (David and Marouani, 2016[18]). While the majority of intra-MENA labour migration flows have traditionally been directed towards Gulf labour-importing countries, two other patterns that do not involve Gulf countries can be identified (IOM, 2010[19]). The first concerns migrations from highly-populated MENA countries to resource-rich countries such as Libya – although this pattern is most likely not as significant as in the past due to important changes in the regional situation over the past decade, especially with regard to the attractiveness of Libya. The second consists in "replacement migration" flows between countries that are both labour-importing and labour-exporting. These flows generally occur between Levant economies (including Egypt) and may encompass both skilled and unskilled migrations. Different patterns can be identified, from situations where job vacancies resulting from the emigration of nationals are directly filled by incoming migrants, to situations where internal social mobility creates a skills gap between migration inflows and outflows.

Jordan provides an example of a country at the centre of such "replacement migration" flows. As an important labour exporting country, a large part of its labour emigration is highly skilled (with 62% of labour emigrants holding a university degree in 2010 (Wahba, 2012[20]) and directed towards the Gulf. Incoming migration to Jordan, on the other hand, is an interesting illustration of the South-South labour mobility flows occurring between Southern Mediterranean countries. According to data from the Labour Department of Jordan, most of the foreign workers (nearly 65%) in Jordan in 2015 came from Arab countries, and more specifically from Egypt (61%) (EMNES, 2018[21]). This figure encompasses only migrants arriving to Jordan with on a work visa, and thus excludes the important refugee population in Jordan, mainly from Palestinian Authority and Syria. 93% of these foreign workers had a qualification level equivalent or inferior to secondary education, confirming the low skill intensity of labour migration between Southern Mediterranean countries (ibid).

Between 2000 and 2015, the number of Egyptian migrant workers in Jordan more than doubled (Razzaz S, 2017[22]). In 2016, according to CAPMAS, Egyptian migrants in Jordan represented 18% of all Egyptian migrants in the MENA region (CAPMAS, 2017[23]), making Jordan the second most important destination for migration outflows from Egypt after Saudi Arabia – and first destination in the UfM region. This is in line with findings at the sub-regional level pointing to a large-scale phenomenon of unskilled labour migrations between Syria, Jordan, Lebanon, Palestinian Authority and Egypt in the 2000s, in particular for seasonal migrations, driven by slight income differentials between countries during this period (Bardak, 2017[24]).

Nonetheless, these South-South dynamics remain minor compared to outward migration patterns from Southern Mediterranean countries to the EU, or to other MENA countries outside the UfM region. Indeed, within the Southern Mediterranean sub-region, the share of migration outflows towards other countries of the sub-region, relative to the total migration outflows from the sub-region, decreased between 2005 and 2019, indicating the persistence of barriers to and lack of attractiveness of labour mobility between countries of the sub-region.

South-South migrations in the Western Balkans

South-South migration flows within the Western Balkans sub-region follow a dynamic considerably different to that observed between Southern Mediterranean countries. In recent years, migration for work purposes between Balkan countries – especially migrations for family motives – has been decreasing relatively to other forms of migration. Eurostat data indicates that, while first-time residence permits for work purposes accounted for 43% of all permits issued to intra-Balkan migrants in 2008, this share dropped to approximately 20% in 2016 (World Bank/Vienna Institute for International Economic Studies, 2018[25]).

Studies covering the period 2009-13 had already pointed out to the seasonal character of intra-Balkan labour migrations. Indeed, a majority of work permits to foreign workers were issued in the tourism, agriculture and construction sectors, which have an important seasonal component. The share of work permits among all temporary residence permits had consistently increased between 2009 and 2013, reaching 67% in Montenegro in 2013 (IOM, 2014[26]).

Previous studies have also highlighted the central role played by Montenegro in intra-Balkans labour migration flows: in 2013, the country attracted about three-quarters of all regional migrant workers (Vidovic H et al, 2015[27]). These flows were mainly low-skilled, with 87% of work permits in Montenegro issued to migrants with secondary educational attainment or below. Albania, on the other hand, was in large part excluded from intra-regional flows, attracting only 1% of regional migrant workers (ibid).

During the same period, studies documented the relatively recent phenomenon of return migration in Balkan countries. As an illustration, the number of Albanians returning increased sharply after 2008. A total of 133,554 Albanian immigrants returned to Albania during 2009–13, 35% of whom were youth aged between 18 and 29. These return migrants represent a significant potential in terms of labour supply for their country of origin.

Immigrants' contribution to and integration into the labour market in host countries

Immigrants constitute a sizeable share of the labour force in the key countries of destination in the UfM region. At the regional level, the share of foreign-born labour force among all workers increased slightly from 10% in 2010 to 12% in 2019 (Table 4.2). During the same period, in the 33 countries of destination of the UfM, labour participation rates of immigrants increased from 72% to 74%. While data on employment rates of immigrants by country of origin does not allow us to conduct an in-depth analysis of migrants from UfM countries' contribution to and integration into host countries' labour markets, interesting insights can be drawn from qualitative analysis and specific case studies.

Table 4.2. Foreign-born labour force in UfM countries, by sex

Labour force	2010			2019		
	Total	Male	Female	Total	Male	Female
Foreign-born from all countries (in thousands)	21 998	11 956	10 041	28 092	15 338	12 751
Share of foreign-born work force in total workforce	10%	9%	10%	12%	11%	12%

Note: Data refer to labour force aged between 15 and 64 years. *Foreign-born from all countries* refer to persons born outside of the reporting country, including non-UfM countries. Data are available for 32 UfM countries: 27 EU countries, Montenegro, Bosnia and Herzegovina, Egypt, Israel and Turkey. For Montenegro, Turkey and Israel 2010 data refer to 2011 or 2012; data for Egypt and Israel refer to 2011 and 2017 instead of 2019.
Source: Authors' calculations based on ILO 2020, *Labour force by sex, age and place of birth (dataset)*, https://www.ilo.org/shinyapps/bulkexplorer4/?lang=en&segment=indicator&id=MST_TEAP_SEX_AGE_CBR_NB_A.

Emigration for economic purposes has been a structural feature of Southern Mediterranean and Balkan countries for decades. Due to geographical, political and social ties, as well as a growing demand for low-skilled labour in the industrial sector in Europe, migration outflows from the Southern Mediterranean, and in particular from North Africa, have historically been directed towards Western European countries. Today, persistently high unemployment rates and lack of training and job opportunities in most Southern Mediterranean and Balkan countries continue to be an important driver of sustained emigration towards the EU. However, while potential economic gains from working abroad constitute an important factor which motivates people to migrate, migrants are also attracted by other reasons such as education and training opportunities, family reunification, marriage, or better public services in more economically developed countries. Survey results on the motivations of working-age migrants in Morocco and Bosnia and Herzegovina, presented in Box 4.2 suggest significant heterogeneity in motivations across gender, age, and country. This sheds light on the omplexity of factors shaping propensity to migrate in the UfM region, which relates not only to the destination country's attractiveness but also to potential emigrants' willingness to move, linked to their subjective appreciation of their situation in their country.

Accordingly, the foreign-born labour force in destination countries includes different categories of immigrants, many of whom had not come primarily for work-related reasons or with a work visa. In particular, family migrations continue to represent a major feature of migration patterns in the UfM (namely from Southern Mediterranean to EU countries) and contribute significantly to the constitution of a foreign-born labour force in destination countries. Nearly one-half of incoming family migrants from Southern Mediterranean countries are in their prime working age (between 20 and 50 years old) and therefore likely to search for work opportunities upon arrival in their destination countries (Alcidi et al., 2019[28]). Historical links between countries, through the family migration channel, thus contribute to facilitating migrations in the context of increasingly restrictive migration policies. This is highlighted in (Box 4.3) which provides an overview of the trends in migrations between Morocco and France, one of the most important cross-Mediterranean migration patterns in the UfM region. It showcases how long-standing migration pathways can be sustained despite changes in the economic conjuncture, namely through the enduring role of family links.

Box 4.2. Motivation of working-age migrants

Motivations of intentional and current emigrants in Morocco

Results from a recent national survey by Morocco's High Commission for Planning (2020) on migration propensity and motivations for emigration among Moroccan prospective and current emigrants shed light on the important role played by economic motives in decisions and/or intentions to emigrate. Among prospective emigrants, 60.3% reported wishing to emigrate for employment purposes and 15.5% stated reasons related to studies and training, while 8.2% put forward costs and standard of living as the main driver behind their desire to emigrate. Moreover, being unemployed seems to constitute an important factor shaping migration intentions, as just over 50% of unemployed respondents reported wanting to emigrate, compared to only about 22% of those employed.

Similar findings were found regarding the reasons that pushed current emigrants to leave Morocco. More than half (53.3%) of Moroccans currently living abroad emigrated for economic motives, mainly related to employment and improvement of working conditions. Education and training constitute the second most frequently reported reason for emigrating (23.4%), followed by family reunification and marriage (19.9%).

The survey also points to significant variations in motivations behind migration across socio-demographic groups. Economic motives are more prevalent among men than women, with close to two-thirds of current male migrants but only 26% of current female migrants reporting employment opportunities, improvement of working conditions and/or living standards as the primary reason for having emigrated. A similar, if somewhat smaller, gender gap was also found among prospective migrants (economic reasons were cited as the main driver behind the desire to emigrate by 81.8% of men, compared to 58.7% of women). Conversely, educational motives were more frequently reported as drivers of emigration by women than men, both among prospective and current migrants. Family motives were significantly more important for female (41.4%) than male (9.2%) emigrants.

Determinants of youth migration from Bosnia and Herzegovina

A recent empirical study on emigration from Bosnia and Herzegovina uses data from USAID's 2017 National Survey on Citizens Perception (NSCP) to shed light on different factors affecting Bosnians' propensity to leave their country, with a focus on youth. Results indicate that economic factors come into play, with unemployed respondents 13% more likely than those employed to consider emigrating.

At the same time, a number of non-economic factors are identified as playing an important role in shaping migration propensity. For example, the level of satisfaction with public services and institutions significantly affected respondents' likeliness to consider emigration.

While this suggests that quality of and trust in national institutions may affect one's decision to emigrate, interestingly, the study does not find any evidence of a link between overall satisfaction with life and propensity to emigrate.

Source: (Haut-Commissariat au Plan, 2020[29]), (Begović et al, 2020[30]),

Box 4.3. Focus: Labour migrations between Morocco and France

After Spain, France is the second most popular destination for Moroccan emigrants, with an average of 27 300 permits delivered each year by France to Moroccan nationals between 2010 and 2019.

While historically, labour migration from Morocco to France was essentially composed of low-skilled workers, important shifts have occurred over the past two decades. Morocco has consistently been a major provider of seasonal workers in France, and the first non-EU provider. According to Eurostat, out of the 5,594 first-time resident permits issued to non-European seasonal workers in 2018, approximately half (2,611) were issued to Moroccans (Eurostat, 2020[31]). Most of these seasonal migrants work in the agriculture sector. At the same time, the past decade has witnessed an acceleration in other types of labour migrations from Morocco. Among first permits granted by France to Moroccan nationals for work reasons between the early 2010s to 2019, permits for seasonal work increased by 270%, while other work permits increased by close to 400%.

Moreover, migration patterns have been characterised by a growing interest towards immigration of highly qualified youth, which has manifested in several bilateral agreements concluded between France and Morocco to foster mobility of young Moroccan professionals seeking job experience in France. An initial agreement was concluded in 2001 to implement the “young professionals” framework, which provides for the immigration of 300 Moroccans every year, for a period of 3 to 18 months. This framework has since then expanded to give the possibility for young professionals to obtain a renewable 4-year resident permit, under the “Talent Passport” framework created in 2016. This applies to highly qualified professionals, artists, and those looking to create their company and/or invest in France. In 2019, according to data published by the French Ministry of Interior, 19,366 permits had been delivered under the “Talent Passport” framework; however, lack of country-disaggregated data does not allow estimating the number of Moroccan beneficiaries from this scheme.

A significant evolution in recent migration patterns between the two countries concerns the fast-growing trend of student migrations. This category of migrants more than doubled between 2008 and 2018. The number of first-time student resident permits issued to Moroccans increased from 4,919 to 11,229 over the period, making Morocco the top non-EU provider of student migrants in France. In turn, France represents the top destination for Moroccan students, hosting over 29 000 out of the 51 000 Moroccan students abroad.

This trend is relevant with regard to labour migrations, as most students remain and search for employment in France after obtaining their degrees. Indeed, data collected in the framework of the MIREM (Return Migration to the Maghreb) project study suggests that, from 2005 to 2008, only 12.5% of Moroccan migrant students returned to Morocco after completing their studies. However, it must be noted that, since the beginning of the 2000s, Moroccan emigration to France has been marked by a decreasing share of labour emigration. Family reunification now represents the most important feature of Moroccan emigration to France, which explains in large part the relative stability in migration flows between Morocco and France over the past few decades.

Source: ((Eurostat, 2020[31]) (Lacroix, 2018[32]) (UNESCO, 2020[33]), (Bel-Air, 2016[34]) ((Bouoiyour el al, 2014[35])

Over the past years, labour market integration of migrants from non-EU UfM countries in the EU have been marked by differentiated trends. Regardless of qualification level, in virtually all EU countries, employment rates of non-EU immigrants were lower than that of immigrants from other EU countries, indicating integration gaps between non-EU and intra-EU immigrants. In particular, studies found that in EU countries, workers originating from North Africa had lower employment rates than migrants from other regions – including outside of the UfM. In 2018, employment rates for North African immigrants averaged 50.3%, compared to 65% for total foreign-born workers in the EU (OECD, 2020[6]). Moreover, in contrast to most other migrant groups, labour market outcomes of migrants born in the Middle East have not significantly improved in recent years, with more than one in five migrants from this region living in the EU unemployed in 2018, essentially the same as in 2013 (OECD, 2019[36]).

Similarly, employment rates for non-EU young migrants (20-34 years) not in education or training were lower than for other subpopulation groups (Eurostat, 2019[37]). In contrast, among all young employees (aged 15-34 years) in the EU, those who were non-EU-born consistently had high rates of temporary employment, increasing from 46% in 2010 to 56% in 2019. Despite the fact that temporary employment could be associated with underemployment and other risks and vulnerabilities, it has the potential to provide important opportunities for migrant youth, who are generally more inclined to undertake temporary migration – and who are often not motivated solely by economic gain, but also by a desire for personal development, among other reasons (UN, 2013[38]).

Meanwhile, recent years have witnessed a nascent trend of highly skilled migration from UfM countries towards the EU, reaching 20% among emigrants aged 18-34 in 2017 (Alcidi, 2019[14]). Non-EU UfM countries are providing a growing pool of young, skilled potential workers searching for opportunities abroad. Emigration for education purposes has also been growing, although it still represents only a minority of migration outflows (Bardak, 2015[13]). This could represent a driver of greater socio-economic integration among these migrants, as their education may significantly improve their employment prospects in the country.

Indicator M2: Visa requirements

Visa policy is an important factor that can facilitate circulation of people between countries. Heavy visa requirements, limitations in duration of stay, and difficulties in obtaining work permits, can significantly hinder mobility in the UfM region.

The Henley Passport Index, which ranks countries based on the number of destinations their citizens can access without a prior visa, reveals that there is considerable scope for softening visa requirements within the UfM region, between EU and non-EU countries as well as within the Southern Mediterranean sub-region.

Visa requirements between EU and non-EU countries

The visa requirements between EU and non-EU countries within the UfM region as of 2020 are shown in (Table 4.3 and Table 4.4), respectively for non-EU citizens travelling to EU countries and for EU citizens travelling to non-EU countries. Of note:

- Progress made in terms of visa liberalisation has Albania, Bosnia and Herzegovina and Montenegro to join the list of visa-exempt countries in 2010. For all other countries except Israel, significant entry requirements to the EU remain in place.
- The share of visas not issued (out of the total visa applications) for nationals of Southern Mediterranean countries remains high (Schenghen Visa Info, 2019[39]). Also, compared to 2014, the rate of not-issued visas has increased for nationals of all Southern Mediterranean countries over the past five years.

Table 4.3. Visa requirements in the UfM: non-EU citizens travelling to EU countries

		Country of origin												
Country of destination		ALB	DZA	BIH	EGY	ISR	JOR	LBN	MRT	MNE	MAR	PSE	TUN	TUR
	AUT													
	BEL													
	BGR													
	HRV													
	CYP													
	CZE													
	DNK													
	EST													
	FIN													
	FRA													
	DEU													
	GRC													
	HUN													
	IRL													
	ITA													
	LVA													
	LTU													
	LUX													
	MLT													
	NLD													
	POL													
	PRT													
	ROU													
	SVK													
	SVN													
	ESP													
	SWE													

Note: Green cells indicate visa-free access. Light red cells indicate that incoming citizens require a prior visa to enter the country.
Source: Henley & Partners 2020, *Henley Passport Index*, https://www.henleypassportindex.com/passport.

It is interesting to note that restrictions are not reciprocated. Only Algeria requires EU nationals to obtain a prior visa to enter the country, while in other countries, travellers holding an EU passport can either travel visa-free or obtain a visa upon arrival. These provisions facilitate tourist arrivals from the European Union, due to the importance of the tourism industry in several Southern Mediterranean economies (see Indicator M3, on the contribution of tourism to GDP and employment).

Table 4.4. Visa requirements in the UfM: EU citizens travelling to non-EU countries

	Country of destination												
Country of origin	ALB	DZA	BIH	EGY	ISR	JOR	LBN	MRT	MNE	MAR	PSE	TUN	TUR
AUT													
BEL													
BGR													
HRV													
CYP													*
CZE													
DNK													
EST													
FIN													
FRA													
DEU													
GRC													
HUN													
IRL													
ITA													
LVA													
LTU													
LUX													
MLT													
NLD													
POL													
PRT													
ROU													
SVK													
SVN													
ESP													
SWE													

Note: Green cells indicate a visa-free access. Yellow cells indicate a visa-on-arrival policy. Light red cells indicate that incoming citizens require a prior visa to enter the country. An asterisk indicates citizens require a prior visa, but can obtain it through an electronic visa application.

Source*:* Henley & Partners 2020, *Henley Passport Index*, https://www.henleypassportindex.com/passport.

Visa requirements within the Southern Mediterranean sub-region

Important barriers remain to human mobility within countries in the Southern Mediterranean. As Table 4.5 shows, travel between countries requires a prior visa in most cases. In fact, the Southern Mediterranean countries' ranking in the Henley Passport Index has deteriorated over the past decade, ranging from 74th for Tunisia to 102nd for Lebanon (where the highest rankings are for countries whose citizens benefit from visa-free access to the largest number of countries).

At the same time, significant variations exist across Southern Mediterranean countries regarding citizens' options for travelling visa-free to other countries in the sub-region:

- Tunisian citizens need a prior visa to travel to only two countries (Egypt and the Palestinian Authority);

- Lebanese and Palestinian nationals need a prior visa for all but three and two countries of the sub-region, respectively.
- Reciprocal visa waivers exist between certain countries, such as between Algeria, Morocco and Tunisia; Egypt and Jordan; or Jordan and Lebanon.

Table 4.5. Visa requirements between Southern Mediterranean countries, 2020

	Country of origin									
Country of destination		DZA	EGY	JOR	LBN	MRT	MAR	PSE	TUN	DZA
	DZA									
	EGY									
	JOR									
	LBN									
	MRT									
	MAR									
	PSE									
	TUN									
	TUR									

Note: Green cells indicate a visa-free access. Yellow cells indicate a visa-on-arrival policy. Light red cells indicate that incoming citizens require a prior visa to enter the country.
Source*:* Henley & Partners 2020, Henley Passport Index, https://www.henleypassportindex.com/passport.

Visa requirements and trade in services

The development of trade in services has contributed to the emergence of new forms of cross-border mobility as a means to supply such services. The cross-border movement of people may not account for a large share of services trade (4% of imports and exports of trade in services in the EU with non-EU partners), but is essential for international business operations.

"Movement of natural persons" constitutes one of the four modes (Mode 4) of supplying internationally tradable services in the General Agreement on Trade in Services (GATS). This refers to "the [temporary] presence of persons of one WTO member country in the territory of another for the purpose of providing a service"[3]. Different categories of workers can fall under this scope: i) intra-corporate transferees; ii) business visitors; iii) contractual service suppliers; iv) independent professionals. The duration of the temporary stay abroad can vary – from a few days or weeks in the case of business visitors, to several years for intra-corporate transferees – as long as the purpose of the stay remains services supply. While service suppliers at all skill levels are covered by the GATS, in practice movement of labour in the framework of trade in services mainly concerns highly skilled professionals, managers and business executives.

Restrictions on Mode 4 can take the form of restrictive work visa requirements, which also hinder temporary movement of service providers between UfM countries.

Measuring trade in services is challenging and data do not allow a comprehensive analysis of intra-UfM trade in services through Mode 4. All UfM member countries have made commitments under the GATS, and via bilateral Euro-Mediterranean association agreements (EMAAs) signed between the EU and non-EU Mediterranean countries, as the Barcelona Declaration also contain commitments relative to the liberalisation of trade in services. However, the inclusion of commitments on the movement of natural persons in these agreements has not been systematic. Indeed, the OECD's Services Trade Restrictiveness Index (STRI) suggests that restrictions to movement of temporary services providers are more significant compared to restrictions to other modes in most countries[4].

The EU-North Africa agreements essentially reaffirm both parties' general obligations under the WTO GATS. The agreements with Morocco and Tunisia include commitments on non-discrimination with respect to working conditions and social security for their nationals legally working in the EU. Only the agreements with Algeria and Jordan include a specific provision on the temporary movement of workers in the context of services trade. In the case of Jordan, for instance, the agreement enables Jordanian companies established in an EU country to host Jordanian intra-corporate transferees that are considered 'key personnel'. Negotiations on Deep and Comprehensive Free Trade Agreements (DCFTAs) between the EU and Morocco were launched in 2013, followed by negotiations with Tunisia launched in 2015. Several rounds of negotiations involved the important topic on movement of natural persons. Moreover, the Trade in Services Agreement (TiSA) is currently being negotiated by 23 members of the WTO, including the EU, Israel and Turkey. The EU emphasised, similar with other EU trade agreement, the commitments to highly skilled professionals.

Indicator M3: Contribution of tourism to GDP and employment

International travel and tourism depends on the ability of people to travel freely from where they live to their destination, crossing borders and entering other countries. However, a range of factors influence travel mobility and limit the free movement of people, with adverse consequences for tourism and economic growth. Safety and security, customs and immigration, access infrastructure and aviation regulations are just some of the issues which can influence the freedom to travel (OECD, 2014[40]). Travel facilitation focuses on reducing these impediments and making travel simple and straightforward.

Visa and entry policies which control the movement of people across national borders have a significant impact on travel and tourism. There is considerable potential for smarter approaches to supporting tourism and economic growth, while simultaneously maintaining the integrity and security of national borders.

The UfM region is among the most important tourism destinations worldwide. According to the World Tourism Organisation, the Mediterranean region alone attracted 342 million tourists in 2014, representing 30% of all international tourist arrivals (UNWTO, 2019[41]). While most of these tourist flows remain directed towards Mediterranean European countries (71%), some Southern Mediterranean and South-East Europe economies have emerged as growing tourism destinations in the Mediterranean. Intra-regional tourists make up the majority of tourist flows towards UfM countries, although important gaps remain between European and non-European countries' position in intra-regional tourist flows. In 2010, 81% of tourist arrivals to the Mediterranean originated in Europe, while only 6% of tourists came from the Middle East. Moreover, the importance of intra-regional tourism in total tourism varies significantly across countries: in 2006, tourists originating from Southern Mediterranean countries represented 46% of tourist arrivals in the Levant but only 9% in North Africa.

Over the past decade, the aftermath of the Arab Spring led to a partial redistribution of tourist flows in the UfM region, with Southern Mediterranean countries losing 12 million tourist arrivals between 2010 and 2014, while tourist flows towards Mediterranean European countries increased significantly – and disproportionately – during the same period. However, more recent years have been marked by a revival in tourist arrivals in MENA destinations, which grew by 10% between 2017 and 2018 to reach 87 million, mainly from Europe and other MENA countries (World Travel and Tourism Council, 2019[42]).

This revival was particularly felt in Egypt, Jordan, Morocco and Tunisia.

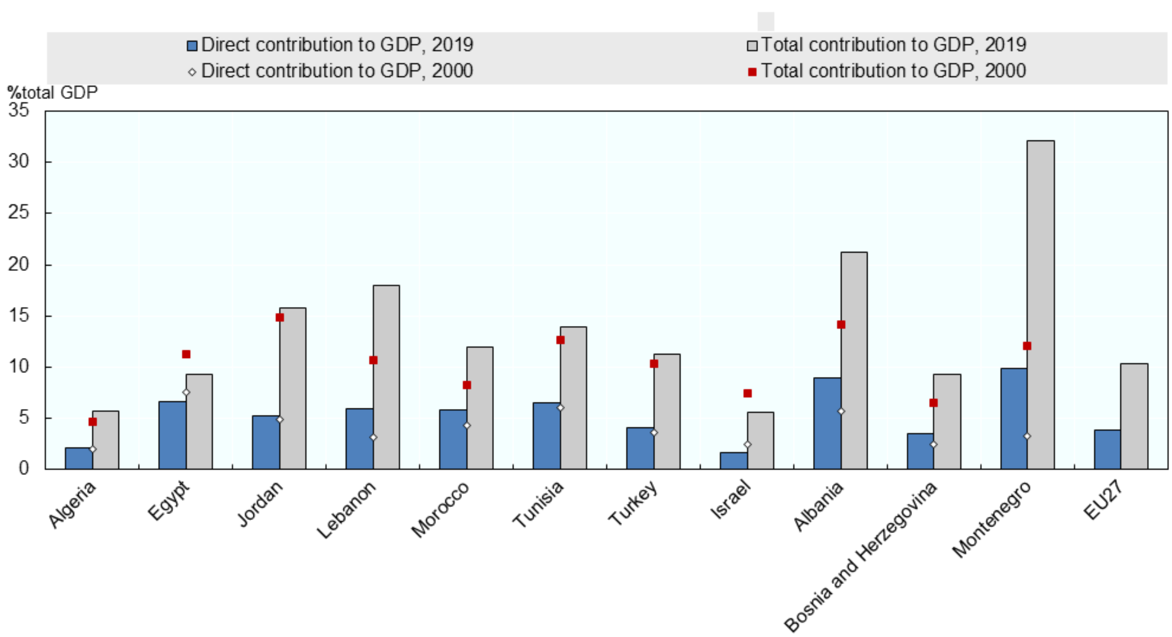
Figure 4.8 and Figure 4.9 give an overview of the contribution of the travel and tourism sector to GDP and employment in UfM member states, highlighting the growing importance of this sector since 2000 in most countries. This importance is particularly marked in a few Southern and Eastern Mediterranean countries, In 2019, when considering both direct contributions as well as indirect and induced impacts, tourism accounted for over 15% of GDP in several countries and as much as 32% in Montenegro. The tourism sector also plays an important role in job creation in the region, accounting for over 10% of total employment in most Southern and Eastern Mediterranean economies. Notable exceptions to this trend are Israel, which has seen the weight of tourism in its economy decline sharply over the past two decades, and Egypt, to a lesser extent.

The importance of tourism to many UfM countries' economies reaffirms the considerable stakes of facilitating travel in the region. Reducing barriers to international travel between UfM countries can significantly contribute to countries' socio-economic development and support greater Euro-Mediterranean integration.

The importance of tourism to many UfM countries' economies reaffirms the considerable stakes of facilitating travel in the region. Reducing barriers to international travel between UfM countries can significantly contribute to countries' socio-economic development and support greater Euro-Mediterranean integration.

Figure 4.8. The weight of tourism in UfM economies: contribution to GDP

Direct and total contribution of the tourism and travel sector to GDP, 2000 and 2019

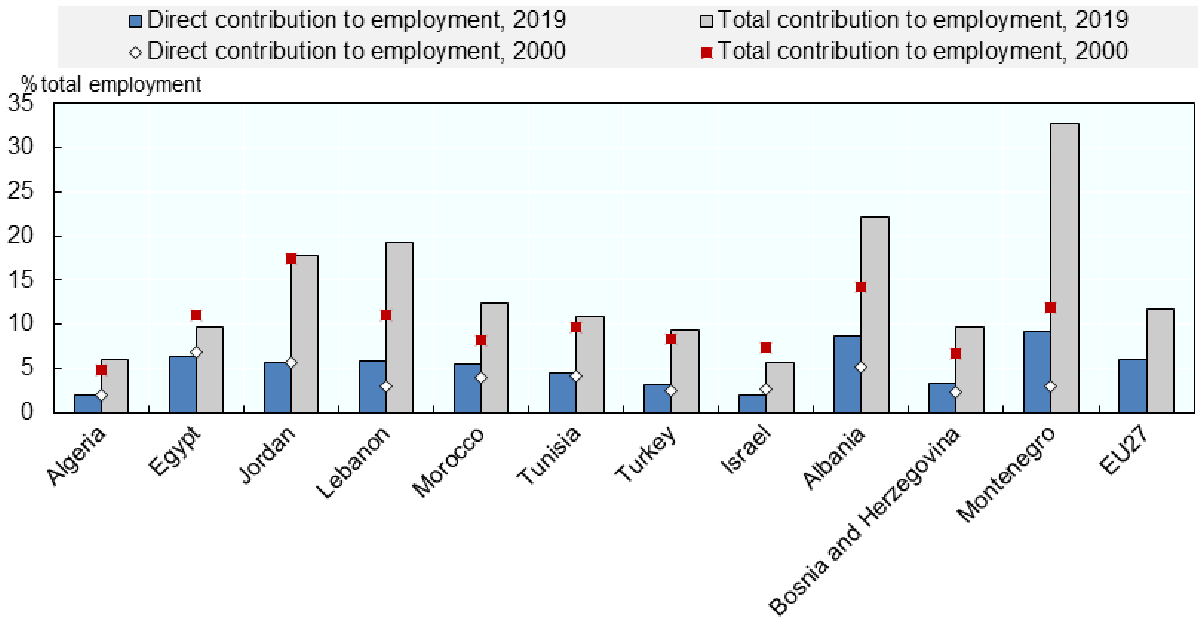


Note: Total contribution to GDP refers to the share of GDP generated directly by the Travel and Tourism sector, plus its indirect and induced impacts. Data for EU27 is from 2018.
Source: (World Travel and Tourism Council, 2019[42]); Eurostat, 2018.

StatLink https://stat.link/dvmp7g

Figure 4.9. The weight of tourism in UfM economies: contribution to employment

Direct and total contribution of the travel and tourism sector to employment, 2000 and 2019



Note: Total contribution to employment refers to the share of jobs generated directly by the Travel and Tourism sector, plus the indirect and induced contributions. Data for EU27 is from 2018.
Source: (World Travel and Tourism Council, 2019[42]); Eurostat, 2018.

StatLink https://stat.link/6zecm7

Indicator M4: Bilateral and regional agreements between UfM countries

This section gives an overview of recent developments in bilateral and regional agreements on mobility between UfM countries, which play an important role in fostering and framing patterns of human mobility at the regional level.

Mobility Partnerships between EU and third countries

Mobility Partnerships were launched by the European Commission in 2007 as a new tool to "provide the overall framework for managing various forms of legal movement between the EU and third countries" (European Commission, 2007[43]). Recognising both the importance of mobility of persons for regional integration between the EU and neighbouring countries as well as the need to enhance cooperation with partner countries to counter irregular migration, Mobility Partnerships aim at: i) expanding legal migration opportunities towards the EU; ii) supporting countries in enhancing their migration management capacities, namely through financial and/or technical assistance; iii) addressing the risk of brain drain by promoting circular and return migration; and iv) facilitating the issuance of short-term visas to nationals of non-EU partner countries.

Several Mobility Partnerships have been signed between EU and non-EU UfM countries since the launch of the instrument, starting with Morocco in 2013 and followed by Tunisia and Jordan in 2014.

These bilateral agreements can constitute an important step forward facilitating circulation of people across the region and, in particular, labour and education mobility. In fact, one of the objectives underlined in the Mobility Partnerships was to increase qualified labour migrations from the three countries to the EU, namely by improving mutual recognition of professional and university qualifications and enhancing information provision regarding education, training and employment opportunities in the EU.

At the same time, the reluctance of other Southern Mediterranean countries, such as Egypt and Algeria, to engage in a Mobility Partnership with the EU sheds light on the limits of these instruments as an efficient framework for facilitating movement of people in the UfM region. The strong conditionality attached to the Mobility Partnerships – which require third countries to commit to the European Union's security policy on irregular migration, including by concluding readmission agreements and reinforcing border management – may constitute a barrier to the establishment of a balanced, and mutually beneficial policy tool to foster mobility. Moreover, despite ongoing negotiations on visa facilitation agreements with Morocco and Tunisia, improvements in the conditions and opportunities for both temporary travel and permanent migrations to the EU for Moroccan and Tunisian citizens are questioned by some researchers (Abderrahim, 2019[44]).

Regional and bilateral agreements between Southern Mediterranean countries

Within the Southern Mediterranean sub-region, mobility of people has been the object of several regional and bilateral agreements. Realising free movement is a key component of intra-Arab regional integration frameworks:

The League of Arab States (LAS) adopted multiple agreements to guarantee, among others, free movement of people between its member countries. These include ambitious treaties such as the Economic Unity Agreement (1957) and the Charter for National Economic Action (1980), which both envisaged the creation of a regional space that would ensure full freedom of movement for Arab citizens, including freedom of residence and employment. However, unlike in the domain of trade, where an Inter-Arab Trade Facilitation Agreement was signed in 1981, no contractual framework was signed to implement the principles of these treaties with regard to movement of people. Instead, a non-binding declaration of principles was adopted. As a result, despite efforts, in particular at the bilateral level, to lift barriers to the circulation of people in the region, implementation of concrete steps to foster full mobility of people remains lagging (UNESCWA, 2014[45]).

The Founding Treaty of the Arab Maghreb Union (AMU) in 1989 foresees the free circulation of people between its five member countries (Algeria, Libya, Mauritania, Morocco and Tunisia). However, despite efforts in this direction, shortcomings remain in the concrete implementation of measures enabling freedom of movement. Unlike other regional economic communities in Africa, the AMU has not yet adopted a Protocol on Freedom of Movement that would lay the foundations for full mobility of citizens in the sub-region. The AMU's performance on the "Free Movement of People" dimension of the Africa Regional Integration Index remains particularly weak (at 0.438 on a scale of 0 to 1) compared both to other regional economic communities in Africa and to its performance on other dimensions of integration such as macroeconomic and infrastructural integration[5].

Several Southern Mediterranean countries have adopted bilateral agreements aimed at promoting human, and more specifically labour, mobility. Table 4.6 gives an overview of the bilateral agreements on human mobility signed between Southern Mediterranean countries in the past two decades. Box 4.3 provides a more detailed account of the long-standing bilateral cooperation between Egypt and Jordan to enhance movement of labour between the two countries.

Table 4.6. Bilateral agreements on human (labour) mobility signed between Southern Mediterranean countries since 2000

Year	Signatory countries	Type
2002	Mauritania, Morocco	Agreement to promote exchanges and cooperation in vocational training
2004	Algeria, Jordan	Agreement on labour force
2004	Algeria, Mauritania	Labour agreement
2006	Morocco, Tunisia	Agreement on residence and movement of workers
2007	Egypt, Jordan	Memorandum of understanding regarding the organisation of the migration of Egyptian labourers to work in the Hashemite Kingdom of Jordan
2012	Egypt, Jordan	Memorandum of understanding
2016	Egypt, Jordan	Labour agreement

Box 4.3. In-depth: bilateral cooperation between Egypt and Jordan on labour mobility

The multiple agreements on labour mobility signed between Egypt and Jordan offer an example of a long-standing cooperation to foster movement of people at the bilateral level. This cooperation dates back to an initial agreement signed in 1985 between the Egyptian Ministry of Manpower and Migration and the Jordanian Ministry of Manpower and Social Solidarity to facilitate and frame unskilled labour migrations from Egypt to Jordan. A subsequent memorandum of understanding (MoU) was signed in 2007, followed in 2009 by a set of regulations regarding migration for family reunification purposes. A second MoU was signed in 2012 laying out the conditions for status adjustment of Egyptian migrants of irregular status. The last labour agreement between the two countries dates back to 2016 and creates a uniform legal and administrative framework for Egyptian migrant workers in Jordan. The agreement also touches on the question of migrant workers' socio-economic integration, namely by specifying their rights and minimum wage, as well as conditions for family reunification (Zohry et al, 2020[46]). These bilateral agreements have contributed to a continuous increase in labour migration flows from Egypt to Jordan over the past decades.

Source: (IOM, 2010[19]), *Intra-Regional Labour Mobility in the Arab World*, https://publications.iom.int/system/files/pdf/alo-iom_intra-regional_labour_mobility_en.pdf

Enhancing mutually beneficial cross-border mobility

Programmes and initiatives to foster migrations

The 2000 Lisbon Strategy highlighted the key role of migrations in helping achieve the objective of making the EU "the most competitive and dynamic knowledge-based in the world" (European Commission, 2009[47]). This has supported a positive approach to migration that regards the settlement of migrants from third countries as an opportunity to address labour shortages in key economic sectors. In light of labour market needs in European countries, this discourse thus stresses the importance of enhancing the EU's attractiveness in order to leverage the potential of third-country highly qualified workers. It must however be noted that the fulfilment of this approach has been largely constrained in practice by the growing importance of a security discourse focusing on the fight against irregular migration in EU migration policy.

Nonetheless, a number of programmes and initiatives to support labour migrations both at the regional and national levels can be highlighted. At the regional level, the main instrument is the **EU Blue Card Scheme**, a harmonised and fast-track procedure to obtain an EU-wide resident permit for non-European professionals taking up highly qualified employment in an EU member state (with the exception of Denmark and Ireland). This scheme provides strong incentives for highly skilled migrants to settle in European countries, including simplified administrative procedures for migrants and their families and equal social security benefits as host country nationals. Since its launch in 2012, the significance of the Blue Card among all work permits granted to immigrants has increased. Blue Cards accounted for 11% of all work permits in 2017 (Alcidi et al., 2019[28]), and nearly 30% of work permits issued to highly skilled workers in 2018, up from 14% in 2014 (Eurostat, 2020[31]). However, the scope of this scheme in intra-UfM migrations has so far been limited. Only three UfM countries (Egypt, Tunisia and Turkey) are among the top ten countries whose citizens were granted EU Blue Cards between 2015 and 2018, and, in absolute terms, the total number of Blue Cards issued to non-EU UfM nationals since the launch of the initiative remains low (ibid).

At the same time, some EU countries have also been developing national schemes to foster labour migrations with the Western Balkans and Southern Mediterranean countries. An example is Germany's simplification of procedures for delivering residence permits for employment purposes to nationals of the six Western Balkan countries. In 2015, the German government introduced a specific migration scheme[6] through which migrants from the Western Balkans could obtain a residency visa for a limited period until the end of 2020 without any pre-requisite other than having a valid job offer in Germany (Bither and Ziebarth, 2018[48]). In a challenging context marked by a surge in asylum seeker applications and a growing demand for foreign labour in Germany, this new scheme contributed to facilitating legal migration to fill labour market shortages, both in low- and high-skilled employment. Between 2016 and 2017, over 117 000 pre-approvals were issued under this scheme, including about half in the "helper" (low-skilled) category and 45% in the "skilled workers" category (ibid). Over a quarter (26.1%) of all visas issued in 2015-17 were issued in Bosnia and Herzegovina, while Albania and Montenegro accounted for a much smaller share, respectively 9.1% and 3.5% (Hoffmeyer-Zlotnik, 2019[49]). Although the number of long-term visas effectively issued under this scheme was lower than the number of pre-approvals, this new channel for labour migration offers an interesting illustration of how countries could promote positive labour mobility in the UfM region.

Making circular migration schemes work for all parties

Since the early 2000s, the European position on migration has seen renewed interest towards labour migration, including low-qualified, in a period of economic rebound combined with an increasingly ageing population creating significant labour needs. At the same time, the growing tensions and concerns over international migration have led to a progressive tightening of European migratory policies towards a security-oriented approach focusing on the fight against irregular migration. In this context, the concept of circular migration has gained attention as a migration policy tool to reconcile the economic imperative of labour migration with a public opinion concerns about open migration policies.

Circular migration is defined by the International Organisation for Migration as "a form of migration in which people repeatedly move back and forth between two or more countries" (IOM, 2019[5]). This cross-border circularity is not time-bound and can take place both through seasonal migrations (less than a year) as well as in the context of more long-term forms of entry; however, circular migration is by definition temporary migration and therefore implies the return of migrants to their country of origin.

The underlying assumption behind circular migration is that of a "win-win-win" situation for origin and destination countries as well as for the migrants themselves, who should benefit from better employment prospects and higher wages. The notion of return that is inherent to the concept of circular migration allows for the possibility for migrants to fill in labour shortages in destination countries during a given period, without spurring concerns of permanent settlement. At the same time, circular migration offers a solution to the issue of "brain drain" from developing countries, as human capital will be transferred back to sending countries through the return of migrants. It could even represent a "brain gain", if additional skills and competences were acquired during migration. Indeed, evidence on return migration in the Southern Mediterranean region points to significant benefits accruing to the labour markets of countries of origin, including higher shares of entrepreneurial activity and higher levels of productivity among returning migrants (European Commission, 2010[50]).

However, it should be noted that the higher propensity to start a business among return migrants may also be due to their inability to find a formal salaried job as their time away is likely to have weakened their local social network, which is crucial for job search in many developing and emerging economies. While seasonal patterns of migration have always existed in the UfM region, the past two decades have witnessed a growing phenomenon of managed or regulated circular migrations. Regulated migrations – as opposed to "embedded" migrations, which refer to self-sustained, grassroots migration patterns – occur within the framework of institutionalised, top-down mechanisms of selection and monitoring of circular migrants (Cassarino, 2008[51]). Regulated circular migrations are to be understood as part of broader cooperation patterns between countries that are often characterised by strong differentials in terms of education, skills, labour market dynamics and development, and have a mutual interest in facilitating back-and-forth mobility of the labour force. The narrative behind managed circular migration is that of better sharing the benefits of migration between migrants by enabling a *turnover* in migrants, thus benefitting a greater number of migrants.

Since the early 2000s, circular migration programmes with Southern and Eastern Mediterranean countries have progressively been incorporated into the EU's migration management approach. In 2007, the European Commission issued a Communication on circular migration[7], recognising the potential of circular migration as a "credible alternative to illegal migration" and "contributing to a more efficient allocation of available resources and to economic growth". The Communication also sets the definition and framework for the type of circular migrations it wishes to facilitate with third countries. In this view, the EU has initiated different instruments aimed at establishing a general framework conducive to circular migrations in the UfM region, such as through the Mobility Partnerships (see earlier section on regional and bilateral agreements). In addition, bilateral circular migration projects have been developed between several EU and non-EU countries in the UfM region, in most cases targeted towards low-skilled, seasonal migrants, and largely concentrated in a few sectors such as agriculture and construction.

While circular migration programmes offer important opportunities for development, there are shortcomings in the way these schemes have been implemented in practice that limit their attractiveness on several levels. First, for employers in destination countries, hiring foreign workers in the framework of circular migration schemes represents additional costs associated with the higher turnover in workers (namely hiring and training costs). Moreover, migrants themselves have little say regarding the choice of job, employer and timing of return, exposing them to risks of exploitation and poor working conditions in host countries. This is one of the main issues with the way in which circular migration schemes are currently implemented, due to the high levels of vulnerability they entail for circular migrants – particularly for low-skilled migrants. Finally, the wins of circular migrations programmes for migrants largely depend on the availability of good economic prospects in origin countries to make return desirable, a condition often not met in many Southern and Eastern Mediterranean countries.

A number of improvements could be introduced to circular migration schemes in order to enhance their attractiveness for all parties, and for migrants in particular. Allowing longer periods of stay and/or repeated migrations by the same individual can enable employers to retain seasonal workers over an extended period, thus increasing return on the costs of hiring and training foreign workers, while providing more security and stability for the migrants themselves. An example in this regard is multi-annual seasonal work permits, such as those issued by France to enable foreign workers with a seasonal contract of at least three months to obtain a work visa that is both valid for three years and renewable. Other areas for improvement include provisions for training and upskilling of low-skilled circular migrants; portability of social security benefits; and better support services for migrants, including information on rights at work and working conditions. Greater emphasis could also be placed on providing support to migrants' re- integration in their home country at the end of their periods abroad, to incentivise return and reduce cases of illegal overstay (Wickramasekara, 2011[52]).

While the bulk of circular migration programmes in the UfM region continues to involve low- to mid-skilled seasonal workers from Southern and Eastern Mediterranean countries responding to seasonal needs in EU countries, in recent years some schemes of circular migration programmes targeting more-qualified individuals have also been implemented. These concern young professionals or higher education students, with modalities often linked to training systems. While these schemes remain limited in scope relative to other forms of migration, they provide some insights into good practices that would gain from being more widely adopted. Examples include:

- A circular migration project between Belgium and Tunisia[8] aimed at enhancing Tunisian youth employability by creating internship and apprenticeship opportunities in Belgian companies for Tunisian university students and/or graduates. The project, launched in 2018 in partnership with the International Organization for Migration (IOM) for a duration of 18 months, enabled 31 young Tunisians to work in a Belgian company (whose activities are similar to those of a comparable company in Tunisia) for a period of six months, thus gaining valuable professional experience and developing their skills and qualifications. At the end of their internship or apprenticeship, participants receive financial support for a period of five months to find employment in a Tunisian company. This initiative falls within the mutually beneficial approach of circular migration because participants, while contributing to fill labour needs in Belgium, are meant to enhance their employability in their home country, in line with the Tunisian government's broader strategy of addressing the issue of unemployment in the country. This particular aspect is key as, too often, a lack of opportunities for migrants to use their newly acquired skills in their home country limits incentives to return, thus blocking potential benefits of these circular migration schemes (OECD, 2018[53]).
- The High Opportunity for Mediterranean Executive Recruitment (HOMERe) project[9] is aimed at promoting internship mobility between countries of the UfM region for young graduates and future graduates. These internship opportunities are offered by companies operating in at least two UfM countries or with development prospects

across the region. In this sense, they give youth the opportunity to acquire experience and skills that will support them in finding employment matching their qualifications in their country of origin, thereby promoting circulation of knowledge and skilled labour in the region. Nine UfM countries are currently involved in the project: Algeria, Egypt, France, Greece, Italy, Lebanon, Morocco, Spain and Tunisia. Since 2008, the project has benefitted nearly 500 UfM students, in the context of either South-North, South-South or North-South mobility.

These programmes could be replaced by a framework of Skills Mobility Partnerships (SMPs), which seek to associate migration and skills development for the mutual benefit of origin countries and host countries, as well as the migrants themselves (OECD, 2018[53]). SMPs can be translated into a large range of models, but always within the scope of organised migration channels in which the costs of training and matching are shared between the sending and receiving countries (and/or employers). Approaching circular migration schemes through the prism of SMPs can contribute to enhancing cooperation on skills development in a way that reconciles origin-country demand and destination-country demand to incentivise return and make mutually beneficial circularity a reality.

This approach to migration would benefit from being further strengthened in order to truly leverage the potential of circular migration, in particular for countries of origin, by ensuring that the latter reap some benefit of skills acquisition. Currently, circular migration schemes targeting students and young professionals remain a minor phenomenon benefitting only a limited number of individuals. In order to scale up these initiatives, further cooperation between UfM member countries is needed – as is greater involvement by employers, training institutions and regulatory bodies in the design and implementation of programmes. There is important scope to foster a framework for circular migrations that will be conducive to greater regional integration and long-term economic gains for both sending and receiving countries.

Supporting re-integration of return migrants

In order to promote sound circular migration schemes in the UfM region, a major challenge relates to the re-integration of return migrants. Adopting measures to support returnees' temporary and permanent re-integration in their countries of origin – measures that were identified as key early on in discussions around circular migration (Cassarino, 2008[54]) – continues to be a necessary condition for the successful implementation of such schemes in a way that benefits all parties.

Re-integration of returnees in the Western Balkans

The re-integration of Albanian returnee citizens is facilitated through "migration counters", as set out in the *Strategy on Re-integration of Returned Albanian Citizens 2010-15*. From 2011 to 2015, nearly 5 000 Albanian citizens approached the migration counters for social assistance on housing, vocational training, employment, entrepreneurship, and legal assistance (Vathi and Zajmi, 2017[55]).

Although recent comprehensive data on profiles of return migrants in Albania are relatively lacking, a 2013 survey conducted by the Albanian Institute of Statistics and IOM shed some light on the profile of migrants returning to Albania. It revealed that the main reasons for returning were linked to job opportunities (loss of job in country of immigration or better opportunities in Albania) and family ties. It also confirmed the importance of re-integration services in influencing returnees' decision to remain or to re-emigrate (although economic reasons prevail over social and administrative ones) and identified some limitations of the migration counters, including lack of visibility and quality of services (Albanian INSTAT/IOM, 2013[56]).

Based on the limitations, the Albanian government, with the support of IOM, has developed training modules to better identify the needs of returned migrants and provide relevant reintegration support or referral services. Information leaflets have been disseminated to increase the public's awareness on pre-departure counselling and reintegration services. Albania also reported in 2019 that the law governing the migration of Albanian citizens for employment purposes was under revision, and that the country plans to refine the services offered by the migration counters to improve their function (CMW, 2019[57]). In addition, the recent development of migration counters will also be evaluated.

The establishment of such mechanisms illustrates the country's efforts to increase the sustainability of return migration by institutionalising the re-integration process for returnees, as highlighted in the National Strategy for Development and Integration (2015-20). Meanwhile, as important as tailored re-integration services are, they are not the sole reason returnees decide to stay. Overall economic conditions in a country and level of access to health system, for example, also heavily influence return migrants' intention to re-emigrate, which implies the necessity to enhance the overall economic competitiveness of the country in a holistic way.

Re-integration of returnees in North Africa

While recent data on return migration to North Africa remains scarce, the latest available evidence from Tunisia points to relatively favourable socio-economic outcomes of return migrants. In 2014, according to OECD data, the employment rate of Tunisian returnees was higher than that of the overall population (47% against 39%), and they were slightly less affected by unemployment (12% against 15%) (OECD, 2018[58]). Moreover, previous studies had found that North African returnees were more likely to invest and/or start a business in their country upon their return, compared to their propensity for entrepreneurship before their initial emigration (Cassarino, 2008[54]). However, this may also be attributed to the over-qualification of highly-skilled returnees and/or a lack of suitable salaried employment opportunities in their country of origin, driving returnees who have the necessary resources to turn to entrepreneurship as an alternative to unemployment.

Important discrepancies exist between the socio-economic re-integration of qualified, well-off migrants, the majority of whom have returned of their own free will, and less privileged, low-skilled migrants whose return was often compelled. This in part reflects differentiated levels of public assistance for re-integration of different categories of return migrants. Indeed, institutional support often takes the form of support for returnees' economic investments and business projects, hence primarily targeting "productive returns", to the detriment of the needs of the more marginalised category of returnees (CIFOIT/FIERI, 2019[59]).

Overall, the institutional framework on re-integration in North Africa has traditionally been limited, mostly based on bilateral social security agreements with major countries of emigration to guarantee portability of social benefits. Study conducted between 2005 and 2008 had identified a lack of institutional mechanisms to support return migrants' re-integration in North Africa. Among return migrants surveyed in Algeria, Morocco and Tunisia, less than 10% on average had reported having benefitted from public assistance upon their return (Cassarino, 2008[54]).

While efforts have since been made to enhance support for re-integrating return migrants, significant scope for improvement remains. In Morocco, funds have been made available to support returnees' productive investments in certain key economic sectors; however, these instruments apply only to certain categories of return migrants, and the number of returnees who have effectively benefitted from financial support under these funds remains extremely limited (CIFOIT/FIERI, 2019[59]). A more comprehensive framework exists in Tunisia, where several institutions have targeted schemes for return migrants. For example, the Agency for Promotion of Industry and Innovation and the Agricultural Investment Promotion Agency offer financial and fiscal benefits to Tunisian returnees investing in the country.

However, in both countries, surveys conducted with return migrants and institutional stakeholders revealed that re-integration of return migrants is not perceived as an important question at the national level. While much consideration is given to leveraging resources from the diaspora, a comprehensive and structural framework to support the re-integration of return migrants still appears to be lagging.

Finally, in the last decade important migration flows in the MENA region have been associated to situations of conflict, with concerned goverments implementing initiatives to improve employment opportunites of refugees (Box 4.4).

Box 4.4. Immigrant integration in Jordan in the context of a refugee crisis

The labour market outcomes of Jordanians, migrant workers and refugees are very much tied to each other. Jordan has historically been an important destination for migrant workers from the Southern Mediterranean, especially for low-skilled Egyptian workers. The onset of the refugee crisis in 2011 has exacerbated the complexity of labour market conditions. It is estimated that Jordan hosts 1.3 million refugees, almost 90% of whom reside outside refugee camps, competing for jobs alongside Jordanians and migrants. Within the private sector, many occupations have become dominated by specific nationalities of migrant workers in informal employment. According to official statistics (which tend to underestimate the number of non-Jordanian workers), Jordanians comprised nearly three-quarters of construction workers in 2017, with Egyptian migrants and Syrians accounting for most of the remaining quarter, filling mainly labour-intensive jobs.

The Business and Human Rights Resource Centre has documented a range of rights violations against migrants and refugee workers in the construction sector, including longer working hours; unsafe working conditions; late or non-payment; limited or no worker representation, freedom of association or access to remedy; and extortion and fraud in the context of recruitment for work.

In order to improve opportunities for formal employment and promote decent work for all in the construction sector, the Jordanian government has taken important steps with the support of the international community. The Ministry of Labour signed a Memorandum of Understanding with the Construction Contractors Association in 2017 to waive the quotas for hiring Jordanian labour in the sector. The MoU also provides Syrian employees with the flexibility to change employers, allowing for greater mobility in sectors where occupations are seasonal or of limited duration. This privilege, however, has not yet been extended to other migrant workers, which maeate further stratification in the already segmented sector. To enhance the employability of Syrians (and Jordanians) in construction, the National Employment and Training Company and the ILO have established skill-certification programmes to upgrade participants’ professional expertise and help them obtain accredited skill certificates.

With regard to support for migrant workers, in line with Jordan’s commitment to the 1998 ILO Declaration on Fundamental Principles and Rights at Work and its Follow-up, the ILO will support the negotiation of new collective bargaining agreements in the construction sector in the Decent Work Country Programme (2018-22), regulating working hours, occupational safety and health in the work place, and dispute- settlement procedures. The General Federation of Jordanian Trade Unions plans to amend its bylaws to allow migrants to vote and become full members; this will allow migrant workers to lobby for equal rights and non-discrimination in the workplace, including on wage discrimination.

Source: (Razzaz S, 2017[22]) (ILO, 2018[60]) (Acaps, 2020[61])

Enhancing youth employability in the UfM region

Despite significant progress in terms of educational outcomes, challenges related to youth employability in Southern Mediterranean countries continue to constitute an important barrier to movement of people in the UfM region. As the world's second-youngest region, the Southern Mediterranean sub-region faces great challenges in providing quality employment opportunities for its young labour force, especially young women. Although in several countries (Egypt, Jordan, Tunisia) women now outnumber their male counterparts in terms of tertiary education graduates, they remain disproportionately affected by unemployment (OECD/ILO/CAWTAR, 2020[62]).

While higher educational attainment is traditionally associated with a higher probability of migrating, this is not always the case in the MENA region, where most educational systems emphasise credentials (i.e. academic or educational qualifications) rather than skills and their portability. In general, portability of skills enhances graduates' chances of finding employment outside of their countries' public sectors (World Bank, 2020[63]). However, evidence from Morocco and Tunisia points to a tendency towards increased educational attainment among migrants. As an illustration, in 2015/2016, among Tunisian migrants who had been living in an OECD host country for less than five years, 40% were higher-education graduates, compared to only 21% of those who had been settled in the country for over five years (OECD, 2018[58]).

Enhancing youth employability by equipping young graduates with the necessary skills to perform in a globalised economy, is key to enhancing labour mobility in the region and facilitating integration of young migrants in receiving countries. Transferrable skills that can serve both destination and origin countries' labour markets can enable greater participation of Southern Mediterranean youth in mobility schemes between UfM countries. This calls for enhanced investment and cooperation between countries in the area of skills development, with a particular focus on the jobs and skills of the future. Linking migration and training policies will allow the region to move towards more efficient mobility of its workers. In this view, the implication of the private sector is key to defining the professional profiles and skills that are of interest and aligning the training offer with concrete needs on the ground.

Over the past decade, efforts have been undertaken by several UfM countries to support youth employability. An example is the Mediterranean New Chance (MedNC) project[10], which aims to enhance cooperation between institutions and organisations working towards the socio-professional integration of youth across the region. Through its network of stakeholders, the project implements capacity-building activities and promotes the exchange of best practices and innovative educational and training methods to improve youth employability, in particular of women and NEETs (those who are not in education, employment or training). Eight countries are taking part in the initiative: Algeria, Egypt, France, Lebanon, Morocco, Portugal, Spain and Tunisia.

Moving forward, it will also be important to enhance cooperation in the area of skills recognition. Indeed, mobility in the UfM region is currently hampered by the absence of regional frameworks for skills recognition that would support workers in integrating with a variety of labour markets and give employers access to a larger pool of potential candidates. Existing tools at the EU level – such as the European Qualifications Framework (EQF)[11], a translation tool that makes different national qualifications comparable in view of supporting cross-border mobility of learners and workers – are an example of good practices which would benefit from being reproduced at the UfM regional level. Bilateral agreements for mutual recognition of qualifications could also serve as possible starting points for moving towards greater harmonisation of national qualifications frameworks in the region.

Conclusions and policy considerations

Movement of people for migration in the UfM region has significantly increased over the past 25 years, with the number of intra-UfM migrants almost doubling to reach 37.1 million persons in 2019. This constituted 4.5% of the regional population, exceeding the ratio of international migrants to the global population. While in numerical terms progress of migration has been impressive, it must be noted that patterns of migration have not significantly changed. The EU continues to play a central role in migration patterns, including labour migrations, in the UfM region. The EU alone attracted more than one-half of immigrants from other UfM countries in 2019, with North Africa and the Western Balkans providing the lion's share of migrants, when excluding intra-EU migrations.

- The Western Balkans remain a massive emigration sub-region, with now 30% of its population migrating to a neighbouring EU country. Continuous efforts have been made in the region to encourage migrants and emigrants, a sizable share of whom are working-age youth, to return.
- Family migrations remain a major feature of migration patterns in the UfM, in particular between Southern Mediterranean and EU countries. Family reunification, which is relatively insensitive to the economic conjuncture, is an important factor behind the relative stability of migration patterns in the region over the past 25 years.
- France remains the most important destination for North African emigrants, due to historical ties with the sub-region. It is followed by Spain and Italy, which have witnessed significant increases in migration inflows from North Africa since 1995 as a result of geographical proximity and labour needs. A trend – more or less recent, depending on the country – of highly skilled migration from North Africa should nonetheless be noted and has contributed to a moderate diversification in migration trajectories, with countries such as Sweden, Finland and Luxembourg emerging as new destinations.

Progress has been made in terms of facilitating movement of people across the UfM region, although this has not benefitted all countries in the same way.

- Over the past 25 years, several visa facilitation agreements have been signed to enable visa-free travel, in particular between EU and Balkan countries, as a necessary – although insufficient – condition for movement of persons. However, there remains considerable scope for softening visa requirements between EU and Southern Mediterranean countries, as well as within the Southern Mediterranean sub-region.
- Several bilateral agreements have been signed between EU and non-EU UfM countries, including in the framework of Mobility Partnerships, serving as an important step forward in facilitating labour and education mobility across the Mediterranean Sea. Some Southern Mediterranean countries have adopted bilateral agreements aimed at promoting labour mobility, within the intra-Arab regional integration frameworks.
- Since the early 2000s, the EU has been promoting circular migrations as a tool to address both labour market needs in destination countries and a number of sensitive issues linked to permanent settlement of migrants. While the design of circular migration

programmes has been driven by a “triple win” narrative for origin and destination countries as well as migrants themselves, their implementation has often been detrimental to migrants’ rights and working conditions, especially in the case of low-skilled, seasonal workers in sectors such as agriculture or construction. In order to address these shortcomings, countries should review the design of circular migration schemes in a way that puts migrants’ rights at the centre and ensures the attractiveness of circularity for all parties – origin and host countries, employers, and migrants.

- At the same time, recent years have seen a nascent trend of mobility schemes targeting new categories of migrants including tertiary education students and young, highly skilled professionals. However, the number of migrants actually recruited through these schemes remains anecdotal among total migrations, calling for greater cooperation between countries to expand the reach of these initiatives. Expanding and integrating such programmes in the framework of Skills Mobility Partnerships can contribute to enhancing youth employability, in particular in Southern Mediterranean countries. The important challenge remains of developing sustainable mobility patterns that also support return migrants in re-integrating into the labour market in their origin countries.

Addressing the question of youth employability is crucial to diversifying patterns of migration in the UfM region. In order to make mobility schemes work in practice, and to ensure that the benefits of these schemes also accrue to origin countries, consideration should be given to policies aimed at increasing the quality of education systems and labour market opportunities in Southern Mediterranean countries. Greater recognition of skills and competencies at the regional level can also significantly contribute to enhancing mobility by making qualifications more readable and understandable across different systems in the region. In this view, UfM member countries should take steps to move towards greater harmonisation of national qualifications frameworks, building on existing tools at the EU level or on bilateral agreements for skills recognition.

- Existing programmes and schemes focusing on development and transferability of migrants’ skills provide a good illustration of how EU and non-EU UfM member states are cooperating to encourage mobility of workers and learners in the region. Expanding and generalising such schemes will allow for diversification away from the predominantly low-skilled, seasonal character of labour migrations between the two shores of the Mediterranean and toward the development of new forms of labour mobility from Southern Mediterranean countries in particular. In this regard, the involvement of the private sector is key to defining the professional profiles and skills that are of interest and aligning the training offer with concrete needs on the ground. Linking migration and training policies should enable greater participation of Southern Mediterranean youth in mobility schemes between UfM countries, and more efficient mobility of workers in the region in general.
- International travel is another important form of movement of people in the UfM region. The Mediterranean region is among the most important tourism destinations worldwide, with intra-regional tourists making up the majority of tourist flows towards the region. Tourism is also a significant contributor to growth and employment in UfM countries, with particularly important weight in several Southern and Eastern Mediterranean economies. However, a range of factors linked to security and safety as well as visa and entry policies influence travel mobility and limit the free circulation of people in the region. In light of the considerable importance of tourism to the region, countries should take steps to facilitate travel between UfM countries. There is considerable potential for smarter approaches to supporting tourism and economic growth while simultaneously maintaining the integrity and security of national borders.

- One of the challenges in assessing and understanding the mobility of persons in the UfM region is the lack of comparable data over time and across the region. In particular, important gaps remain regarding data on migration by type and country of origin – as well as sex- and age-disaggregated data and data on employment by occupations and skills, working conditions and wages. Data on return migration are also lacking. Southern Mediterranean and Western Balkan countries would gain from significantly strengthening their capacity for migration-related data collection, analysis and dissemination.
- Moving forward, data collection is essential to monitoring progress in the forms of human mobility countries are seeking to promote. In particular, new indicators should be developed to assess the effectiveness of policies aimed at facilitating positive mobility patterns. As new mobility schemes are being implemented in the region, specific indicators could be developed relating to the number of programmes implemented and/or the number of individuals migrating within the framework of such programmes.

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Annex 4.A. Intra-UfM migration statistics

Annex Table 4.A.1. Size of migrants and migrant-to-population ratios by countries/sub-regions, 1995-2019

Intra-UfM immigrants and emigrants (in thousands)

	UfM	BAL	EU	LEV	NA	ALB	ALG	BOS	EGY	ISR	JOR	LEB	MAU	MON	MOR	PA	TUN	TUR
1995																		
Intra-UfM immigrants	22015.1	101.3	16615.5	2086.3	194.2	58.2	45.9	43.1	83.5	669.8	1379.8	535.8	2.8	0.0	33.2	170.7	28.8	853.9
Intra-UfM emigrants	22015.1	1401.7	11679.9	1909.8	3737.8	412.0	940.1	919.4	525.5	148.0	88.0	162.7	15.8	70.4	1802.2	1659.1	454.3	2486.7
Intra-UfM immigrants to population ratio	3.2%	1.3%	3.9%	19.4%	0.1%	1.9%	0.2%	1.1%	0.1%	12.7%	30.1%	15.2%	0.1%	0.0%	0.1%	6.5%	0.3%	1.5%
Intra-UfM emigrants to population ratio	3.2%	18.5%	2.7%	17.8%	2.9%	13.2%	3.3%	24.0%	0.8%	2.8%	1.9%	4.6%	0.7%	11.3%	6.7%	63.4%	5.0%	4.3%
2005																		
Intra-UfM immigrants	27716.1	82.2	21157.9	2589.4	243.4	52.8	30.0	29.4	149.9	619.1	1818.1	616.8	2.9	0.0	35.8	154.6	24.8	921.1
Intra-UfM emigrants	27716.1	1785.9	14868.2	2538.0	5002.9	825.7	1528.7	902.6	560.1	143.8	91.1	187.3	24.8	57.7	2343.8	2259.7	545.5	2396.9
Intra-UfM immigrants to population ratio	3.7%	1.1%	4.9%	18.4%	0.2%	1.7%	0.1%	0.8%	0.2%	9.5%	31.5%	13.1%	0.1%	0.0%	0.1%	4.3%	0.2%	1.4%
Intra-UfM emigrants to population ratio	3.7%	23.9%	3.4%	18.1%	3.3%	26.7%	4.6%	24.0%	0.7%	2.2%	1.6%	4.0%	0.8%	9.4%	7.7%	63.2%	5.4%	3.5%

	UfM	BAL	EU	LEV	NA	ALB	ALG	BOS	EGY	ISR	JOR	LEB	MAU	MON	MOR	PA	TUN	TUR
2019																		
Intra-UfM immigrants	37149.0	118.5	28305.4	2941.8	312.8	40.1	37.9	22.4	171.0	587.5	2233.9	567.9	3.0	56.0	69.7	140.0	31.2	1302.9
Intra-UfM emigrants	37149.0	2089.1	21769.2	3133.0	5965.2	1010.7	1820.2	1015.1	538.4	148.3	103.3	239.7	34.8	63.3	2919.2	2790.0	652.6	2703.9
Intra-UfM immigrants to population ratio	4.5%	1.7%	6.4%	13.4%	0.2%	1.4%	0.1%	0.7%	0.2%	6.9%	22.1%	8.3%	0.1%	8.9%	0.2%	2.8%	0.3%	1.6%
Intra-UfM emigrants to population ratio	4.5%	30.7%	4.9%	14.3%	3.0%	35.1%	4.2%	30.8%	0.5%	1.7%	1.0%	3.5%	0.8%	10.1%	8.0%	56.0%	5.6%	3.2%

Note*:* This table only considers intra-UfM migration, thus migration only among the UfM member states. Ratios for UfM, BAL, EU, LEV, NA are weighted averages. BAL refers to Western Balkans, EU refers to 27 European Union, LEV refers to Levant, NA refers to North Africa.

Source*:* Authors' calculation, based on UN DESA 2019, *International Migrant Stock* (database), https://www.un.org/en/development/desa/population/migration/data/estimates2/estimates19.asp.

Notes

[1] The Southern Mediterranean region includes Algeria, Egypt, Jordan, Israel, Lebanon, Mauritania, Morocco, Palestinian Authority, Tunisia and Turkey.

[2] The MENA region includes Algeria, Bahrain, Djibouti, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Palestinian Authority, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates and Yemen.

[3] On GATS Mode 4, see: https://www.wto.org/english/tratop_e/serv_e/mouvement_persons_e/mouvement_persons_e.htm.

[4] See https://www.oecd.org/trade/topics/services-trade.

[5] Africa Regional Integration Index, https://www.integrate-africa.org/rankings/regional-economic-communities/amu.

[6] Section 26, sub-section 2 of the Employment Regulation (*Beschäftigungsverordnung* or *BeschV*).

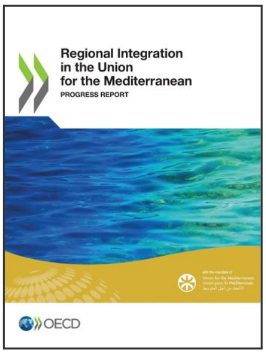
[7] European Commission (2007), Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on circular migration and mobility partnerships between the European Union and third countries", COM(2007)248 final

[8] Project "Enhancing Tunisian youth employability through professional internships in Belgian companies" between Belgium and Tunisia, in partnership with the IOM. Project factsheet available at: https://belgium.iom.int/sites/default/files/Gallery/Factsheet%20Enhancing%20Tunisian%20Youth%20Employability_EN.pdf.

[9] Information on the HOMERe project is available at: https://ufmsecretariat.org/project/homere-high-opportunity-for-mediterranean-executive-recruitment.

[10] Information on the MedNC project is available at: https://ufmsecretariat.org/project/mediterranean-new-chance-mednc/#:~:text=The%20Mediterranean%20New%20Chance%20(MedNC,in%20particular%20second%20chance%20schools.

[11] Information on the European Qualifications Framework is available at: https://europa.eu/europass/en/european-qualifications-framework-eqf.



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