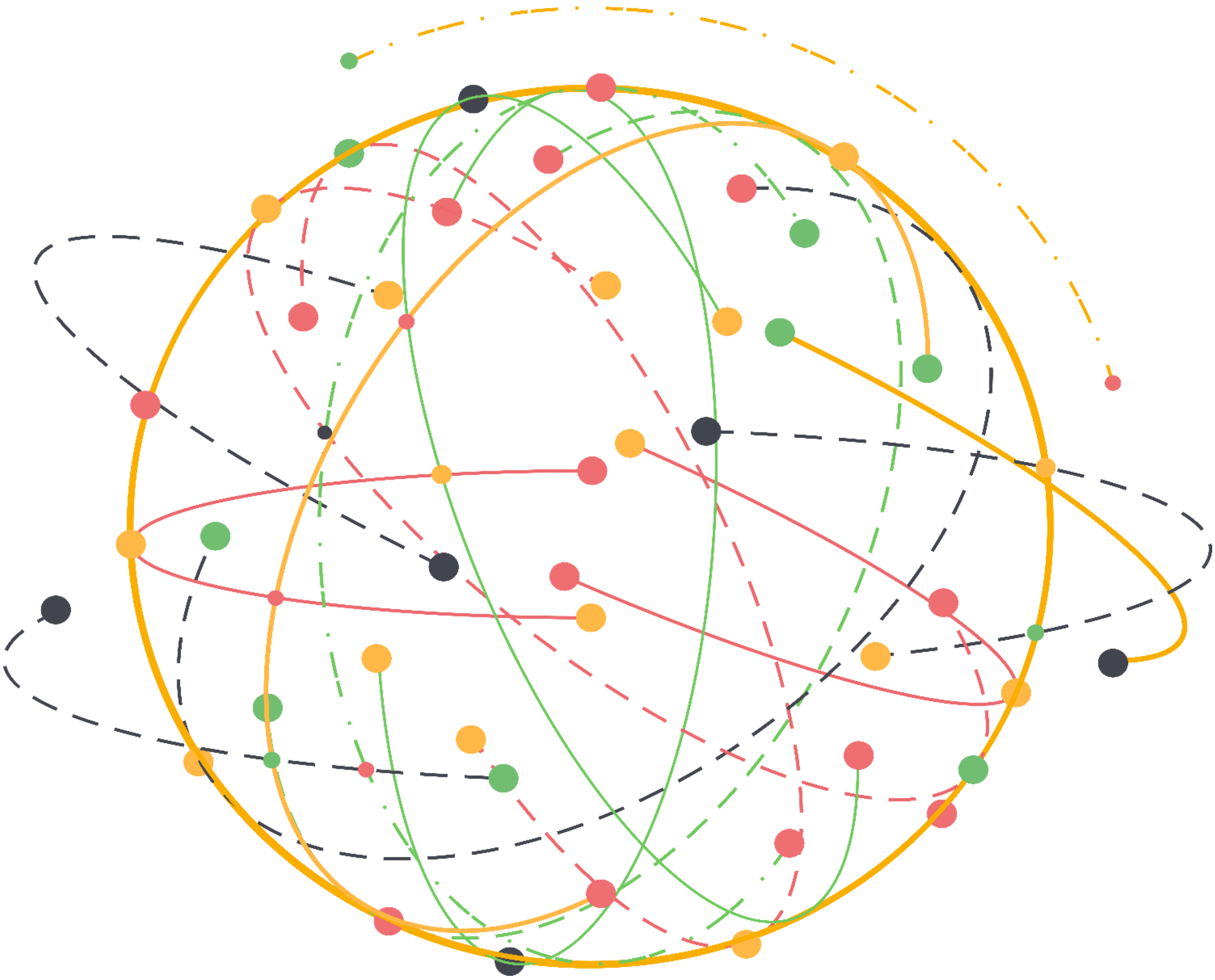


ICMPD Migration Outlook 2021

Seven things to look out for in 2021

Origins, key events and priorities for Europe

Seven things to look out for in 2021

2021 will be another challenging year for EU migration policy. Below is a non-exhaustive list of trends and developments that will be high on the agenda of decision-makers and analysts alike.

1. The development of the COVID-19 crisis
The COVID-19 pandemic has triggered the worst global crisis since the end of World War II. It has caused deep social, economic and political disruptions in all societies around the world. Migration was no exception. The pandemic has cut off mobility pathways, stranded migrants, destroyed jobs and income, reduced remittances and pushed millions of migrants and vulnerable populations into poverty. It has, however, not put an end to migration. The further development of the pandemic will determine the imposing or lifting of mobility restrictions, trigger or impede migration movements, allow economies to recover or push them further into recession. All of this will largely influence the size and direction of formal and informal migration flows in 2021.

2. Uneven access to vaccines and economic recovery as migration drivers
The recent rollout of coronavirus vaccination programmes fuels hope for an economic rebound and substantive growth at least in the second half of 2021. The inequality gaps in GDP and household incomes, however, are expected to widen among the world regions. This trend will be amplified by uneven access to vaccines. At the beginning of 2021, approx. 60 % of all expected vaccine doses have already been purchased by high-income countries, leaving only 40 % to lower- and middle-income countries. Higher-income countries will recover faster, both economically and socially, and the resulting imbalances will increase short-term migration pressures in 2021.

3. Greater pressures on migration policy in the aftermath of the pandemic
The economic rebound in the aftermath of COVID-19 might further boost formal and informal migration to the EU, creating more opportunities for newly arriving immigrants than for the resident labour force. Such a trend is likely to be reinforced by heightened emigration pressures in low- and middle-income countries and enhanced demand for immigration in high-income countries. European policymakers should be prepared to explain to their electorates why the economic rebound does not immediately reduce unemployment for the resident population and why newly emerging jobs are filled by immigrants.

4. Setbacks in migration cooperation with non-EU partners

The fallout of the COVID-19 pandemic has dramatically deteriorated the social, economic and political situation in many regions that are the origin of migration to Europe. Against the background of worsening crises, these countries might find it increasingly difficult to cooperate on migration control and return. Consequently, the EU should place full emphasis on the further development of its migration partnerships but also lead efforts by the international community in supporting low- and middle-income countries, especially those in the European neighbourhood, in their economic recovery.

5. Migration impacts from newly emerging crises like the Sahel

Over the last two years, the conflict in the Sahel has developed into one of the world's worst humanitarian and displacement crises. Between 2018 and 2020 an estimated 1.8 million people were internally displaced and 845,000 people had to flee across borders, 650,000 people in the last year alone. 13.4 million are believed in need of humanitarian assistance, 5 million of them children. The coronavirus pandemic has worsened the situation and led to a surge in extreme poverty and malnutrition. Somewhat contrary to popular belief, asylum applications from African nationals in the EU rank clearly behind the ones from Asia and the Middle East, Latin America and other European countries. A rapidly emerging crisis in the Sahel, however, affects several countries in the region and might indeed result in a significant increase in irregular arrivals and asylum applications in the EU. The rise in arrivals along the Central Mediterranean Route and on the Canary Islands in 2020 indicates that related flows might play an increasingly significant role in 2021 as well.

6. Shifts along the main migration routes to Europe

In 2020, irregular arrivals shifted away from the Eastern Mediterranean Route to the Central Mediterranean and the Western Balkans Routes. Along the Eastern Mediterranean Route, the number of detections decreased by a remarkable 75.0 %. This shift resulted mainly from the closing of borders and suspending of the admission of asylum applications by Greece at the beginning of 2020. Conversely, the Central Mediterranean Route saw an increase in detections of 155.0 %, the Western Balkans Route an increase of 105.0 % and the Western African Route (to the Canary Islands) an increase of almost 900 % in comparison to 2019. In 2021, much will depend on the prolongation of cooperation between the EU, Turkey and Libya. Emerging crises and changing opportunity structures could lead to quick shifts in routes and numbers in 2021. The EU should be prepared to respond equally quickly to such shifts along the main migration routes.

7. Continued work on the EU Pact on Migration and Asylum

2020 was the most intense and ambitious year in the attempt to put the Common European Migration and Asylum System on a new foundation. The extensive discussion process was accompanied by a myriad of new proposals and positive attitudes not seen in a long time. Ultimately, all these efforts were not sufficient to overcome the long-standing stumbling block to an EU-wide agreement on reform, namely the issue of solidarity and responsibility sharing. Work will continue, however, during the Portuguese and Slovenian EU Presidencies. Progress can be expected on the package of new instruments and legislative proposals underpinning the political part of the Pact. In terms of high politics, the focus in 2021 will be on strengthening the external dimension of the Pact, i.e. the further development of migration partnerships with important countries of origin and transit for migration to Europe. In view of globally increased migration pressures caused by the pandemic, such prioritisation would seem very reasonable.

1. Introduction

ICMPD's Migration Outlook presents a **brief analysis of migration and policy trends** and provides an outlook on developments and events to watch out for in 2021. Thus, the outlook does not claim to foretell the future or to cover all relevant trends. It seeks to draw on past experience and highlight what might happen and what is important to consider.

According to the latest estimates, there were **272 million international migrants** in 2020, representing 3.5% of the world's population. The number of international migrants grows moderately yet faster than the world's population. Two thirds of all international migrants are labour migrants. Mainly responsible for the relative increase in international migration is the global rise in conflict and violence. Between 1993 and 2019 the number of **globally displaced** more than tripled from **21.4 million** to **79.5 million**; the number of **internally displaced** increased by more than ten times from **4.2 million to 45.7 million**. Internal conflicts lead to the largest numbers of displaced persons. In 2019, 68% of all refugees worldwide came from five countries in protracted and multi-facetted conflict situations: Syria, Venezuela, Afghanistan, South Sudan and Myanmar.

2. A migration year shaped by the COVID-19 pandemic

International migration cannot be explained by a single cause. But there is a number of **main drivers or megatrends** that influence the size, direction and patterns of international migration flows more than others. These factors are war, civil war and conflict; the globalisation of economies, values and aspirations; changing technologies and means of communication; shifting demographics; increasing longevity; increasing educational levels; urbanisation and climate change. These drivers are embedded in **global opportunity structures** that drive decisions and enable or prevent individual migrations projects. Global opportunity structures comprise geographical proximity or distance; the density and capacity of migration control; entry and residence regulations; the existence and capacities of migrant smuggling networks; the characteristics of asylum and protection systems; job opportunities on formal and informal labour markets; the existence of family and social networks and the degree of cooperation between states along migratory routes.

Any outlook on an upcoming migration year will have to consider these **long-term trends** and assess their potential development in relation to the **impact of short-term developments and events**. There is no doubt that the emergence of the **COVID-19 pandemic** has not only caused a global health crisis of historic dimensions but was also the event that impacted International Migration in 2020 more than any other and that will continue to shape the migration year 2021 as well. The pandemic itself and the subsequent containment measures have led to the **deepest economic recession** since World War II, put enormous pressures on public health systems, disrupted food and supply chains and affected the entirety of established formal and informal channels for migration and mobility in one way or another. In early 2020, the first pharmaceutical producers published highly promising results on the efficacy of their **coronavirus vaccines**. The news not only implied the fastest-ever response to a global health threat but also presented the often-quoted **"light at the end of the tunnel"**, the prospect that the world might leave behind an all-encompassing crisis in the foreseeable future. The first weeks of 2021 saw the roll-out of the biggest vaccination programme in history. However, the initial scarcity of vaccines and challenges in administrating the large-scale programmes served as reminders that the **path to recovery will be long, cumbersome and – most probably – unequal among the world regions**.

The impact of COVID-19 on the economy and on migration

The onset of the COVID-19 crisis in March and the immediate introduction of wide-ranging mobility and migration restrictions had instant and profound impacts on international migration. Almost all countries in the world introduced travel restrictions and strict border controls. There was a **65 % decrease in international travel** in the first half of 2020, not only affecting mobility but also migration. The ILO estimated that **more than 160 million migrant workers** were subject to mobility restrictions in the first half of 2020. According to the International Organization for Migration (IOM), by July almost **3 million migrants were stranded** outside their place of habitual residence and were unable to return due to mobility restrictions. Migrants were exposed to increased health risks, as they regularly work in frontline industries while living in cramped housing conditions. At the same, it became obvious that they work disproportionately often in "**systemically relevant" occupations** that were considered essential for coping with the crisis.

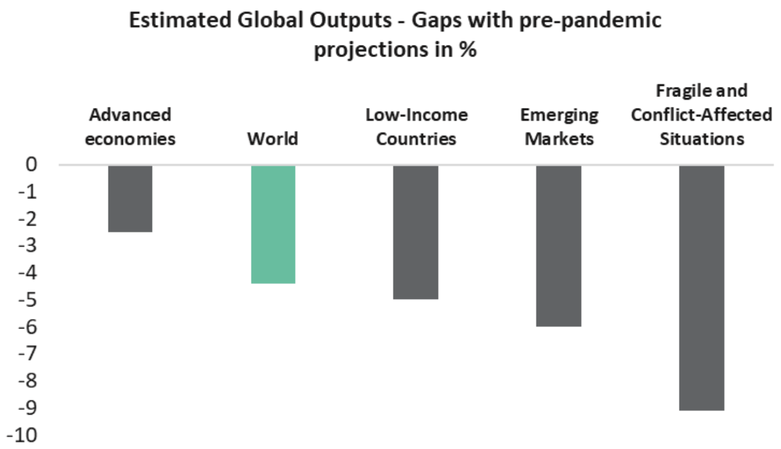
Equally important is the economic fallout of the pandemic. As stated above, economic and wage disparities among the world regions are main drivers of international migration. But economic factors **correlate with conflict** as well. The deep recession caused by COVID-19 has put additional pressure on weak government structures and aggravated domestic and international conflict situations. This trend will continue for some time and likely lead to **an increase in displacement** within and across state borders. The following is a non-exhaustive list of impacts of the pandemic that were observed in 2020 or are expected for 2021.

In its most recent assessment, the World Bank expects a **global economic decline of 4.3 % for 2020**. All world regions are hit by recession, but it is particularly severe in Latin America and the Caribbean with minus 6.9 % and South Asia with minus 6.7 %. Both are important regions of origin for migration to Europe, particularly in the areas of flight and "survival migration". The pandemic is expected to push **another 88 to 115 million people into extreme poverty**, most of them in South Asia and Sub-Saharan Africa. It is anticipated that the global population **exposed to food insecurity** will increase **from 800 million to 1 billion people**. By the end of 2021, the number of **world's poor** living in fragile and conflicted situations will increase **by 14 million** in comparison to 2019. The debt situation especially for low-income countries will worsen even further, leaving few resources to fight the pandemic and help the economically most vulnerable populations. And their numbers will grow. In 2020, global **labour income decreased by more than 10 %** in comparison to the previous year. However, the decrease was significantly higher in low- and middle-income countries, at 15 %. In sum, the global income loss is equivalent to the **loss of more than 240 million jobs**. According to the ILO, more than 80 million jobs vanished in Latin America alone because of COVID-19.

Mobility restrictions led to a **70 % decline in global tourism**. This also has huge effects on economies and societies in low- and middle-income countries, which largely depend on this sector. End-of-the year estimates suggest a **global drop in migrant remittances of 14 %**, making it difficult for migrant families to cover the school fees for their children, medical expenses, housing costs or even food.

Uneven recovery and access to vaccination

There is no doubt that the first half of 2021 will pose enormous challenges for all countries in mitigating the health and economic impacts of the pandemic. Meanwhile there is cause for optimism that the accelerating progress in rolling out vaccination programmes will allow the global community to gradually overcome the crisis. Most countries in the world will continue to struggle with considerable levels of new Corona cases. Nonetheless, the **global economy is expected to expand by 4 % in 2021**. This is less growth than initially hoped for but enough to boost economic optimism, consumption and investment. However, the **path to recovery will be long and uneven among the world regions**. Some of the lesser advanced economies might even have higher growth rates than the advanced ones but will fall back much more clearly behind pre-pandemic growth projections.



Source: World Bank

In absolute terms, the **inequality gaps** in GDP and household incomes will widen among the world regions. This trend will be intensified by **uneven access to vaccines**. At the beginning of 2021, approx. **60 % of all vaccine doses** that will be available over the next 1.5 years have already been purchased by high-income countries, leaving **only 40 % to lower- and middle-income countries** and the **Global Vaccine Alliance COVAX**. While high-income countries will be able to offer vaccination to their entire populations in the foreseeable future, lower- and middle-income countries will not.

3. Focus regions

As in previous years, the situation in the wider European region will be shaped by migration-related developments in **the Near and Middle East, the African regions** and **Latin America**. This does not imply that other world regions deserve less attention, but the major migration movements towards Europe will be linked to the situation in these regions also in 2021. Conflict and economic imbalances will continue to be the main drivers of related flows. The actual dynamics, however, will be highly influenced by the further development of the COVID-19 pandemic, the economic fallout of the crisis and the extent to which containment measures, mobility restrictions and border controls impact migration opportunity structures.

Syria

After more than ten years of war, Syria remains the largest displacement crisis in the world. More than half of the population has been forced to flee. 6.1 million are internally displaced; 6.6 million are refugees, 3.6 million of them in Turkey alone. 11 million Syrians are in need of humanitarian assistance. Constitutional talks continued throughout 2020 and the 5 March ceasefire in the north-west of the country is largely holding. Nevertheless, there is no breakthrough towards peaceful reconstruction yet and violence continued in many parts of the country. The envisaged return of displaced Syrians to habitats covered by the ceasefire suffered a setback when these places came under renewed attacks in 2020. The actual magnitude of COVID-19 cases in the country is unknown due to low testing capacity but significant community spread is assumed and the impact of the pandemic has further aggravated economic decline and led to rising food insecurity, affecting an estimated 9.3 million people. Although political talks will continue throughout 2021, the combined effects of a widely destroyed civilian infrastructure, outbursts of violence, a shattered economy and an increasing health crisis due to COVID-19 will not allow for an easing of the displacement situation or large-scale returns of Syrian refugees.

Afghanistan

With a total of 2.4 million registered refugees and an estimated 3.8 million internally displaced, Afghan nationals form the second largest refugee population in the world. Almost 90 % of these refugees are hosted by the neighbouring Islamic Republic of Pakistan and Islamic Republic of Iran. 2020 has not brought a significant improvement in the difficult security and economic situation. The peace talks between the Afghan government and the Taliban stalled due to different positions on applicable interpretation of Islam in legislation and the role of the 29 February US-Taliban agreement in negotiations. Violence continued, leading to widespread displacement within the country. Civilian casualties are at pre-peace-talk levels, particularly affecting children and minors. The COVID-19 pandemic has further worsened the dire economic situation. UNDP estimates that the Afghan economy contracted by 6 % in 2020 and that expected recovery between 2021 and 2024 will be moderate and well below pre-pandemic levels. Political instability, economic decline and high unemployment will continue in 2021, keeping the potential for flight and irregular migration from Afghanistan itself and secondary movements from Pakistan and Iran towards Turkey and the EU at a high level.

Iraq

The Iraq conflict has resulted in the displacement of more than 3.3 million Iraqi citizens since 2014. Over the years, the security situation has improved, but there are still an estimated 1.8 million internally displaced persons (IDPs) and returnees in Iraq. Almost 20 % of the entire population are believed in need of humanitarian assistance. The political situation is expected to stay volatile again in 2021. Sectarian tensions, the overspill of US – Iranian tensions into Iraq and civil unrest because of bad public services, high unemployment and delays in payment of public-sector wages are likely to persist in 2021. The World Bank expects Iraq's economy to decline by 9.5 % in 2020, mainly because of the pandemic. A renewed drop in oil prices due to low global demand will make economic recovery even more difficult than in other countries. Together with bleak economic prospects, the protracted and multi-facetted political crisis might prompt an increase in "survival migration" to Turkey and the EU.

Iran

About 3 million Afghans who have fled conflict and the bleak economic prospects in their home country live in the Islamic Republic of Iran, which makes the country host to one of the largest and most protracted refugee populations worldwide. The sanctions against Iran had already worsened the economic situation of this vulnerable group and the impact of COVID-19 pandemic will reinforce this trend. As in previous years, this might pressure Afghan nationals to attempt secondary movements from Iran to Turkey and the EU.

Libya

During the decade that has passed since the revolution, Libya has become host to a widely mixed migration population that includes refugees, labour migrants, IDPs, and migrants in transit towards Europe. UNHCR counts about 44,000 registered refugees and 316,400 IDPs. According to the most recent IOM assessment Libya has about 574,000 migrants belonging to more than 43 nationalities. Already before the pandemic hit the country, many of these migrants were living in dire conditions and with insufficient income opportunities. Prospects worsened even more during the crisis, with the unemployment rate surging to 21 % and some 80,000 leaving Libya for the neighbouring countries in 2020. Departures to Europe almost tripled to approx. 30,000. The dire economic situation is closely linked to the fragile political situation. 2019 saw the largest mobilisation of fighters since 2011. A military stalemate followed and peace talks started in January 2020. In October, the Libyan Arab Armed Forces and the internationally recognised Libyan Government of National Accord (GNA) signed a ceasefire agreement, which thus far has not resulted in a significant easing of tensions. The political, economic and human rights situations will stay volatile in 2021. They will prompt migration movements from Libya to its neighbours and Europe and will make cooperation on migration between Libya and the EU even more challenging than in the past.

African countries

Displacement continued to increase in Africa also in 2020. The number of refugees rose by 15.9 % from a total of 6.3 million to a total of 7.3 million, the number of IDPs from 17.7 million to 18.5 million.

There are more than twenty active refugee situations in Africa, many of them protracted over long time periods, simultaneously including inflows and outflows of refugees but also involving large-scale internal displacement. Ethiopia, for instance, is host to approx. 733,000 refugees. At the same time, some 96,000 Ethiopians had to flee the country and 1.7 million are displaced internally. With 2.3 million refugees, South Sudan is the third largest displacement situation in the world, but there are also 1.7 million IDPs in the country. 907,00 Somali refugees have fled to the Horn of Africa and Yemen; 2.7 million people are internally displaced in Somalia itself, a 28 % increase compared to the previous year. There are “forgotten crises” that result in high degrees of displacement: Over 807,000 persons have fled from the Democratic Republic of Congo and more than 4.5 million are internally displaced. Violence in the Central African Republic has displaced more than a million people. 505,000 Eritrean refugees represent 12% of the country’s total population.

Of increasing concern is the displacement crisis in the Sahel region, including Burkina Faso, Mali and Niger. The crisis had its origin in a separatist rebellion in northern Mali in 2012 and since then has swept violence and instability across the region. All regional and international attempts to put an end to the conflict have not yielded tangible results. Over the last two years, the Sahel has developed into one of the world’s worst humanitarian crises. According to UNHCR 2.9 million people were displaced in the region because of the conflict. Between 2018 and 2020, 2.0 million people were internally displaced and 845,000 people had to flee across borders, 650,000 people in the last year alone. Thus, internal displacement quadrupled from early 2019 to the end of 2020. 13.4 million persons are believed in need of humanitarian assistance, 5 million of them children. The coronavirus pandemic has affected the displaced even more than the general population, in terms of exposure to the virus, lack of access to health care and increased food insecurity due to lockdowns and containment measures. Extreme poverty and a sudden surge in malnutrition are the consequences.

The European debate tends to overrate the share of African nationals among asylum seekers in Europe. In reality, it is a lot smaller than that of nationals from other regions like the Middle East, Asia and Europe itself. However, the Africa-wide increase in displacement, the impact of the COVID-19 pandemic on livelihoods and the rapidly worsening situation in the Sahel do not suggest that related figures will go down in 2021. Much will depend on the development of the Sahel crisis and the political situation in Libya as the main point of departure of irregular movements towards Europe. The rise in arrivals along the Central Mediterranean Route and on the Canary Islands in 2020 indicate that related flows will play an important role in 2021 as well.

Latin America

By the end of 2019, the UNHCR had counted almost 15 million persons of concern in and from Latin American countries. This number indicates almost a tripling in comparison to 2013. The figure for 2019 included more than 8.2 million people who were considered internally displaced and approx. 3.6 million Venezuelans who had been displaced abroad. Thus, the number of forcibly displaced Venezuelans had increased by more than 1 million within one year. Displacement in Latin America is not mainly caused by state persecution but by high crime levels, food insecurity, state fragility, and collapse of livelihoods. By the end of 2020, a total of 231 million Latin Americans were estimated to live in poverty, the highest number recorded in the last 15 years. Thus, COVID-19 hit even harder there than in other world regions. Latin American labour markets are characterised by high income inequality, widespread informal work and a lack of social protection. Consequently, workers could simply not afford to comply with containment measures and continued working. Notwithstanding this, the IMF forecasts an 8.1 % economic contraction for the region in 2020, with almost every country in recession, turning what began as a health crisis more and more into a humanitarian crisis. There is little reason to believe that the situation will significantly improve in 2021. Based on previous trends it can also be assumed that displacement in Latin America will continue to rise. In recent years, the annual numbers of asylum seekers from Latin American countries in the EU had constantly grown. In 2020 mobility restrictions due to COVID-19 had a dampening effect. If the EU lifts travel restrictions for third-country nationals once the vaccination programmes provide real relief, it is likely that these numbers will return to pre-pandemic patterns or even increase.

Eastern Partnership region (EaP)

The Eastern Partnership region (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine) is home to a population of almost 73 million and has 3,322 km of common borders with the EU. The region, however, is anything but homogenous. It is a region of frozen or smouldering conflicts (Donbas, Crimea, Transnistria, Abkhazia, South-Ossetia, Nagorno-Karabakh), inter-regional geopolitical ambitions or democratisation processes influenced by external factors as well as by domestic economic, demographic or system factors. These long-term trends will resonate further in 2021 with potentially growing impact. This is likely to result in increased migration from the region towards its neighbours – west or east, south or north – in all its various forms and motivated by economic insecurity, post-pandemic recovery processes, political instability, displacement due to armed conflicts and a lack of state capacities to accommodate IPDs.

Recent statistics reveal that the EaP countries were not a major region of origin for asylum seekers or irregular arrivals in the EU. Statistics also show that return and readmission of EaP citizens works quite smoothly in comparison to other nationalities. In fact, EaP citizens have been a source of labour for addressing economic and demographic demands of the EU Member States. At the end of 2019, almost 1.8 million citizens of the EaP countries legally resided in the EU on different residence grounds. This constitutes 9 % of all EU residence permits issued to third-country nationals in that year. Notably, about half of all EaP citizens who immigrate to the EU do so for reasons of employment (46 %). Combined with the fact that most non-EU citizens are deemed "essential workers" (care, construction, food, agricultural and accommodation sectors), immigration from EaP countries continues to make an important contribution to the functioning of the economies EU Member States, including during the COVID-19 outbreak.

Poland is the main destination country for migrants from EaP countries: in 2019, more than 30% of all EaP migrants in EU Member States resided in Poland, which constitutes 85% of all third-country residents in this country. Other important destinations for migrants from EaP countries are Italy (mainly for migrants from Ukraine and Moldova), Czech Republic (Ukraine), Greece (Georgia), France, and Germany.

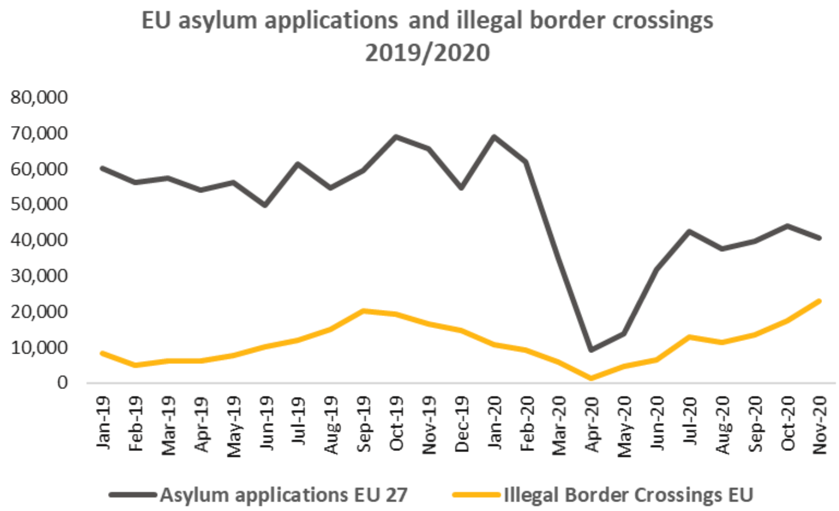
Considering the high demand for “essential” and “sector-relevant” workers in the EU during and after the pandemic as well as growing unemployment in EaP due to business restrictions and the pandemic-related economic downturn, both demand for and supply of migrant workers from EaP countries will remain high. To prevent the resulting migratory flows from unfolding in an irregular manner, all future programmes on the development of labour migration corridors, schemes and partnerships need to focus on the active involvement of the various stakeholders in EaP countries, including the governmental sector, diaspora organisations and migrant communities in EU Member States and the private sector.

4. Migration trends in the EU

As in previous years, the European migration debate in 2020 was dominated by issues surrounding **irregular migration and asylum.** The debate was closely linked to the question of whether mobility restrictions and economic decline related to COVID-19 would lead to a change in trends. Two sets of indicators provide information about related developments: the **detections of illegal border crossings** and the total numbers of **asylum applications** submitted in the EU.

Irregular migration and asylum applications

Between January and November 2020, Frontex registered a total of **116,840 illegal crossings** at the external borders of the EU. This figure implies a **decrease of 7.8 %** in comparison to the **126,730 cases** recorded during the first eleven months of 2019. The moderate decrease that was observed, however, was largely caused by one-off effects from the tight travel restrictions introduced by EU Member States in March. As a result, irregular arrivals decreased at the most drastic rate on record. In April, the related numbers were almost 80 % lower than during the same month the previous year. But as soon as travel restrictions were lifted, figures went up again. In July they had almost reached the levels of the previous year and this trend continued in subsequent months.

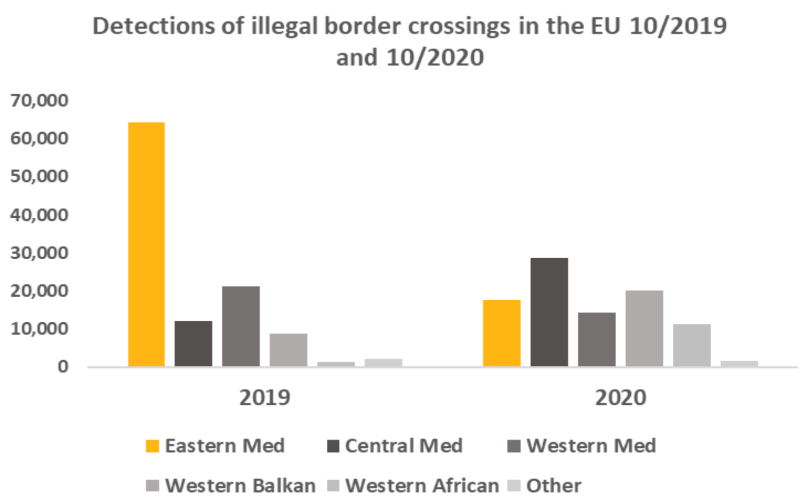


Source: Eurostat, Frontex

Thus, the observed overall decrease has not affected the main routes in similar ways. In 2020, detections shifted away from the **Eastern Mediterranean Route** to the **Central Mediterranean** and the **Western Balkans Routes**. Along the Eastern Mediterranean Route, the number of detections decreased by a remarkable 75.0 % from a total of 75,280 detections in 2019 to a total of 18,490 detections in 2020.

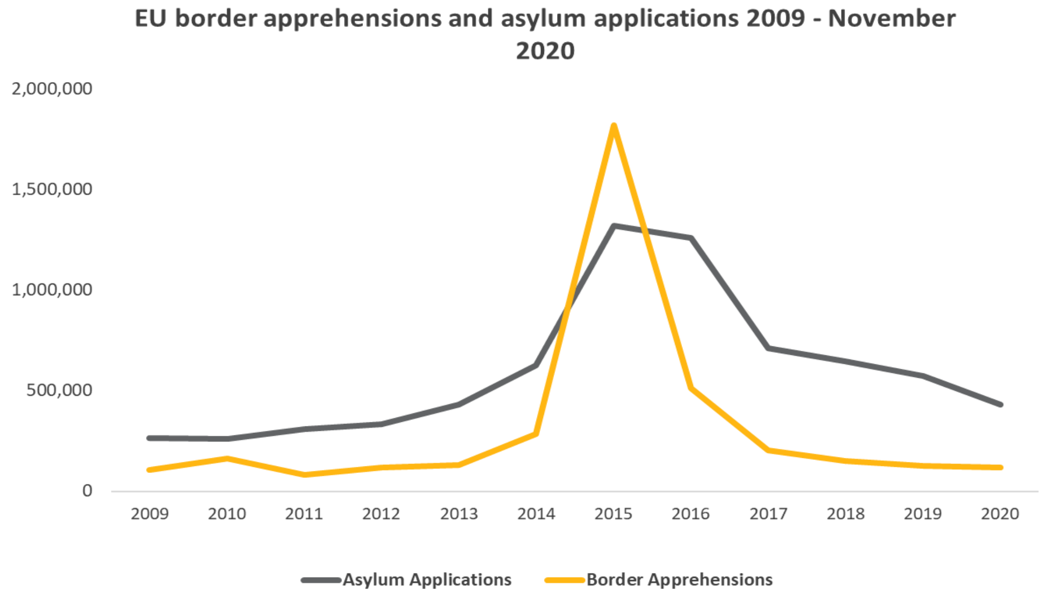
This shift mainly resulted from the **developments at the Greek-Turkish border** in early 2020. For the first time since the conclusion of the migration agreement between the EU and Turkey in 2016, significant refugee flows from Turkey started moving towards Greece. Greece reacted by closing external borders and suspending the admission of asylum applications. Consequently, there was a significant drop in arrivals on the Greek islands. According to UNHCR figures, the total number of arrivals decreased from approx. 60,000 in 2019 to approx. 9,300 in the first ten months of 2020. Nonetheless, there is still enormous pressure on the Greek asylum and reception system. The UNHCR estimates that approx. 120,000 refugees and migrants are currently staying on Greek territory (approx. 105,000 on the mainland and approx. 19,500 on the islands). The inevitably difficult conditions culminated in the catastrophic fire in September at Moria, a camp housing up to 16,000 refugees, but also contributed to shifts in flows and secondary movements to other migration routes.

Consequently, the Central Mediterranean Route saw an increase in detections of 155.0 % (from 14,420 detections in 2019 to 34,187 detections in 2020), the Western Balkans Route an increase of 105.0 % (from 11,100 detections in 2019 to 23,259 detections in 2020). In relative terms, the biggest increases in detections were observed along the Western African Route. In the first eleven months of 2020, a total of 19,600 irregular migrants reached the Canary Islands, a number almost nine times higher than in 2019.



Source: Frontex

Notably, the **trends in detections did not involve all nationalities in similar ways**. Among the nationalities that dominated the numbers of irregular arrivals and asylum applications in previous years (Syria, Afghanistan and Iraq), apprehensions of Syrian nationals moved within last year's trend (a total of 15,604 cases or minus 0.4 %). By contrast, the number of apprehended Afghan nationals decreased by 65.1 % (from 25,131 detections to 8,765 detections) and the number of apprehended Iraqi nationals by 71.1 % (from 5,046 detections to 1,459 detections). While detections of many other nationalities decreased further in 2020, there was a **significant relative increase in arrivals from Southern Mediterranean countries of origin**. The number of apprehended Tunisian nationals increased by 323.2 % in 2020 (from 2,671 detections to 11,305 detections), the number of Algerians by 148.0 % (from 4,504 detections to 11,305 detections) and the number of Moroccans by 20.9% (from 7,251 detections to 8,765 detections).



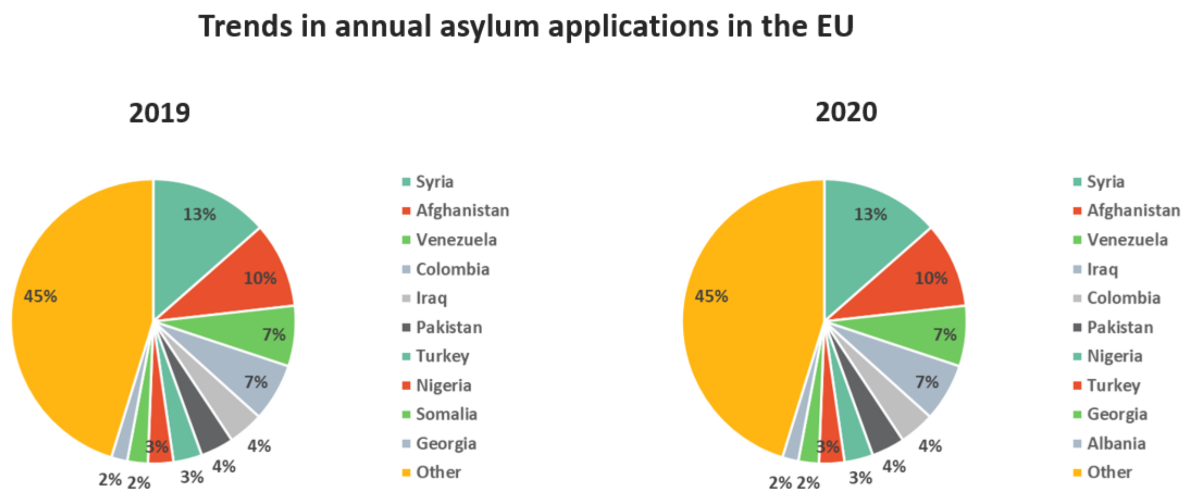
Source: Eurostat, Frontex

The application figures in the EU suggest that only a certain share of asylum seekers were previously detected as illegal arrivals at the EU's external borders. The peak years of the refugee crisis, 2015 and 2016, were outliers in this regard. At that time, refugees arrived mainly by sea where detections are more frequent than on land routes and EU Member States were yet to impose stricter policies on return and intra-European transfers to first countries of asylum in accordance with the Dublin Regulation. As of 2017, the irregular-migration–asylum nexus moved back to previously observed patterns and 2020 was no exception.

In **the first eleven months of 2020, a total of 430,840 asylum applications** were submitted in Member States of the European Union. This represents a **25.6 % decrease in comparison to the previous year** (end-of-November figure for 2019: 578,815 applications; end-of-the-year figure for 2019: 699,095 applications). Asylum figures also saw their biggest drops in the months when strict mobility restrictions were imposed in the EU (March 2020: minus 38.9 % in applications compared to March 2019; April 2020 minus 82.7 %, May 2020 minus 75.6 %). Like border detections, application figures started to catch up again from June onwards, albeit at consistently lower levels than in 2019. Partly, the observed decline could also be a result of delayed admissions due to COVID-19 related restrictions in the reception systems and a resulting statistical backlog. The real story of 2020 will not be known until final EU application statistics are available in March 2021. The figures below refer to the most recent country statistics available at the time of writing.

The three most important countries of origin for asylum seekers throughout the last couple of years, **Afghanistan, Syria and Iraq, showed further decreases in 2020**. Asylum applications from Syria decreased by 18.4 % (from 71,360 applications in 2019 to 58,215 in 2020), from Afghanistan by 21.1 % (from 53,040 applications in 2019 to 41,835 in 2020) and from Iraq by 40.6 % (from 29,110 applications in 2019 to 17,295 in 2020). 2019 was the first year that the **Latin American displacement crisis** had a significant impact on asylum applications in the EU. In 2019, the total number of asylum applications submitted by Colombian and Venezuelan nationals had increased by 176.2 % and 89.5 %, respectively. Almost 90 % of these applications had been submitted in Spain. In 2020, the number of applications submitted in the EU by **Colombian and Venezuelan citizens went down as well**, although not to the extent one might have expected in view of the extensive restrictions on air travel from third countries to the EU. Asylum applications from Venezuela decreased by 28.4 % (from 41,425 applications in 2019 to 29,665 in 2020) and from Colombia only by 0.7 % (from 28,560 applications in 2019 to 28,365 in 2020).

As in previous years, applications were concentrated in a small number of Member States. **78.9 % of all asylum applications were submitted in just five EU Member States**: Germany (25.2 %), France (19.8 %), Spain (19.6 %), Greece (8.9 %) and Italy (5.4 %).



Source: Eurostat

5. Migration policy developments in the EU

Although European governments and institutions were fully occupied with attempts to cope with the coronavirus pandemic and much needed in-person meetings and negotiations on migration issues were limited, **2020 was a particularly busy year for EU migration policymaking.** On 23 September, the European Commission announced its Communication on a **"New Pact on Migration and Asylum"**. The Communication tabled several proposals intended to overcome the gridlock in EU migration policymaking. It contained a variety of fresh ideas on increased border security, return sponsorships, faster asylum procedures, the pre-screening of third-country nationals at the external borders, pragmatic labour migration policies, instruments for permanent and effective solidarity between Member States and comprehensive partnership agreements with third countries.

The Pact was the result of a prolonged political process that had its roots in the 2015 refugee crisis and the subsequent proposals by the Juncker Commission on a reform of the EU's Common European Asylum System (CEAS) and overall migration management framework. These proposals were followed by difficult yet inconclusive negotiations that confirmed the diverging positions of EU Member States on asylum and migration issues. These positions varied in several areas but proved irreconcilable when it came to the question of a **mandatory distribution of asylum seekers** among the Member States.

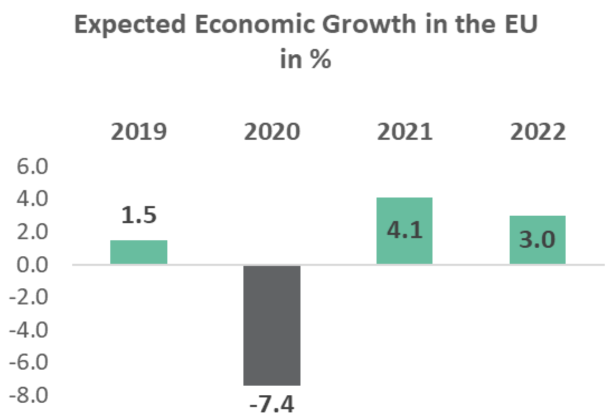
Immediately upon taking office in 2019, European Commission President Ursula von der Leyen set out to make a fresh start on asylum and migration to overcome the existing gridlock. The announcement initiated what is probably the **most holistic attempt** the Commission has ever undertaken to address Europe's migration challenges and opportunities. The final Communication was the result of a 12-month process of intense consultations with the capitals and numerous other stakeholders. It sought to thoroughly integrate the interlinkages between different migration policy areas and between the internal, external and border control dimensions of migration policy in one coherent approach.

The Pact developed several new proposals to deal with the main stumbling block for intra-EU agreement, namely the question of (mandatory) solidarity and responsibility sharing. The overall pressure on EU asylum systems would be reduced with a fast-track border procedure at the external borders that would integrate a pre-entry screening, an asylum procedure and – where applicable – a swift return procedure in one seamless process. The scope of solidarity would be enlarged by adding a return dimension, whereby Member States would assume a "return sponsorship" to effect return of a rejected asylum seeker from another Member States' territory. Other forms of solidarity like the provision of staff and financial support continued to be part of the toolbox, the question as to which of those should be mandatory was kept open.

Ultimately, the above proposals **were not sufficient to achieve full approval by the Member States**. The effort made and the progress achieved were widely acknowledged. Notwithstanding this, the Member States located at the southern borders of the EU see continued imbalances in the proposed elements of solidarity and responsibility and **insist on a mechanism for equitable burden-sharing**, i.e. the notion of mandatory relocation as the main solidarity tool. At the same time there is **unanimous agreement on strengthening the external dimension of the Pact as an absolute priority**, including the broadening of its toolbox and the further deepening of migration partnerships with third countries. The incoming Portuguese EU Presidency emphasised its commitment to give priority to the Migration Pact and its initiatives. The Presidency Programme will focus on the issues of solidarity, regular migration and migration crises and place particular emphasis on deepening partnerships between the EU and third countries.

6. Economic recovery and labour migration

The recent roll-out of coronavirus vaccination programmes fuels **hope for an economic rebound and substantive growth in Europe** at least in the second half of 2021. After contracting by 7.4 % in 2020, the EU economy is expected to grow by 4.1 % in 2021 and by 3.0 % in 2022.



Source: European Union

Economic recovery, however, will have **only a moderate immediate impact on labour markets and unemployment rates**. Many observers see a looming wave of insolvencies, which were delayed due to state-funded support programmes in 2020. These programmes, however, might come to an end rather quickly in times of economic recovery and **limited fiscal leeway**. The aggregate government deficit in the euro area is expected to increase from 0.6 % in 2019 to 8.8 % in 2020, 6.4 % in 2021 and 4.7 % in 2022. Such a development is very likely, would **set free additional workforce and increase unemployment**. There are currently approx. 16 million persons registered as unemployed in the EU. Because of the above trend, these numbers are likely to increase. The **unemployment rate in the EU is expected to rise from 6.7 % in 2019 to 7.7 % in 2020 and 8.6 % in 2021**. It will be 2022 before this trend reverses, with a decrease to 8.0 %.

Moreover, the pandemic has significantly **accelerated the transition of labour markets in terms of digitalisation, automation and artificial intelligence**. Once the economy takes off again, these collective learnings are very likely to boost productivity and growth. But they will also make re-entering the labour market difficult for those who lack the newly required digital and cognitive skills. Already in the past, newly emerging jobs in the EU were filled by migrants with disproportionate frequency, either because they had specific skills and qualifications not sufficiently available in the resident labour force or because they were ready to accept low wages and vulnerable working conditions. The economic rebound in the aftermath of COVID-19 might further boost this trend, creating more opportunities for newly arriving immigrants than for the resident labour force. Such a trend is likely to be reinforced by the effects of an uneven global recovery, which would reinforce emigration pressures in low- and middle-income countries and enhance demand for immigration in high-income countries.

Consequently, European policymakers might face the difficult task of explaining to their electorates why the economic rebound does not immediately reduce unemployment for the resident population and why newly emerging jobs are filled by immigrants. Thus, it can be expected that the **political pressures** on European governments and the **EU to deliver on migration control and the return of illegally residing migrants** will increase even further in 2021.

7. Conclusions for 2021

The migration year 2021 will be shaped by two sets of drivers. First, there are the long-term drivers related to conflict, economic imbalances, socio-economic development and demographic imbalances. And second, there are the migration-related effects of the COVID-19 pandemic that had their impacts already last year and will linger on well into 2021.

A migration outlook for 2021 must assume that the **previously observed drivers will continue to increase the global potentials for international migration**. Conflict will continue to play a particular role and increase flight and displacement as a proportion of total migration flows.

The COVID-19 pandemic has affected populations in all parts of the world but it has hit migrants and vulnerable populations particularly hard. In addition to the loss of life, migrants faced health hazards and had to cope with mobility restrictions and lost income opportunities more often than other groups. Migrant remittances dropped by 14 % in 2020, making it difficult for migrant families to cover school fees for their children, medical expenses, housing costs or even food. Global labour income decreased by more than 10 %, equivalent to the loss of more than 240 million jobs. In most countries and regions of origin for migration, the pandemic has further aggravated political and economic instability and turned existing hardships into severe humanitarian crises. This trend is likely to continue in 2021, indicating increased migration pressures as well. The latter will be boosted by unequal access to coronavirus vaccines among the world regions and resulting uneven paths to economic recovery.

The pandemic will not bring an end to migration. On the contrary, it will further aggravate the global economic imbalances and will increase the pressure on people to migrate in search of a decent living or a better future. When the EU Member States introduced travel restrictions in March, irregular arrivals decreased at the most drastic rate on record. In April, the related numbers were almost 80 % lower than during the same month the previous year. But as soon as travel restrictions were lifted, figures went up again and reached pre-pandemic levels in July. By the end of the year, they had only fallen by 7.8 % in comparison to the previous year. Asylum applications submitted in EU Member States decreased more significantly, by 25.6 % compared to 2019, but this was also a result of delayed admissions and the ceasing of flights from Latin America. COVID-19 had a dampening effect on irregular migration and asylum but the effect was less pronounced than one might have expected.

As regards migration policy, 2020 was a particularly busy year for the EU. The European Commission announced its Communication on a **"New Pact on Migration and Asylum"** tabling a number of proposals intended to overcome the gridlock in EU migration policymaking. The Communication contained a variety of fresh ideas on increased border security, return sponsorships, faster asylum procedures, the pre-screening of third-country nationals at the external borders, pragmatic labour migration policies, instruments for permanent and effective solidarity between Member States and comprehensive partnership agreements with third countries. It was probably the **most holistic attempt** ever made to address Europe's migration challenges and opportunities and was met with significantly more acknowledgement and support than previous attempts. Ultimately, however, it also did not manage to reconcile the fundamentally different positions on solidarity and responsibility sharing. 2021 will see continued work on the package of new instruments and legislative proposals underpinning the political part of the Pact. In terms of "high politics", the focus in 2021 will be on strengthening the external dimension of the Pact instead, i.e., the further development of migration partnerships with important countries of origin and transit for migration to Europe. In view of globally increased migration pressures caused by the pandemic, such prioritisation would seem very reasonable.

The **long-term priorities for European migration policy**, also laid down in ICMPD's own recommendations on "Breaking Gridlocks", will not change in 2021: Renew a common vision on international protection, secure borders and safeguard Schengen, make return policies more effective, create proactive labour market policies, focus on the integration of immigrants, integrate the Western Balkan countries into Europe's migration system, invest in migration partnerships with partner countries, and apply a whole-of-migration-routes approach.

To conclude, it can be assumed that both the long-term drivers of migration and the short- to medium-term effects of the Covid-19 pandemic will tend to increase rather than decrease existing global imbalances and migration pressures in 2021. Europe should prepare for a difficult migration year ahead and invest in global partnership and cooperation to address the related challenges.

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