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# Linking human capital, labour markets and international mobility: an assessment of challenges in Egypt, Jordan, Morocco and Tunisia



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**Suggested Citation: ICMPD (2020)**, Linking human capital, labour markets and international mobility: an assessment of challenges in Egypt, Jordan, Morocco and Tunisia

This publication was produced in the framework of the EUROMED Migration IV (EMM4) programme. EMM4 is an EU-funded initiative implemented by the International Centre for Migration Policy Development (ICMPD).  
[www.icmpd.org/emm4](http://www.icmpd.org/emm4)

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Design: Blueghost

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labour markets and international mobility:  
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Morocco and Tunisia**

## About this publication

This study was produced by the Center for Migration and Refugee Studies at the American University in Cairo (AUC) on behalf of the EUROMED Migration IV (EMM4) programme (2016–2020). EMM4 is an initiative funded by the European Union (DG NEAR) and implemented by the International Centre for Migration Policy Development (ICMPD).

EMM4 is committed to establishing a constructive framework for dialogue and technical exchange regarding migration policy in the Euro-Mediterranean region. In line with this mandate, EMM4 is actively contributing to migration policy discussions with an emphasis on bridging knowledge gaps and building a common understanding of the region's most salient challenges.

This publication follows and builds on the results of the study 'Exploring and Proposing Mechanisms for Labour Matching in the Mediterranean Region', a key programmatic output that identifies structural obstacles to a more optimal allocation of labour in the Euro-Mediterranean region. Taking these obstacles as a starting point, the study adopts a predominantly macro-economic perspective in order to pinpoint migration drivers in four southern Mediterranean countries (Egypt, Jordan, Morocco and Tunisia) and to propose suitable policy interventions from a multi-sectoral standpoint.

These findings complement EMM4's body of work on labour migration management and their aim is to enhance institutional responses at national and international level in line with the United Nations Sustainable Development Goal 10.7 to 'facilitate orderly, safe, and responsible migration and mobility of people, including through implementation of planned and well-managed migration policies'. In this sense, the publication is addressed to experts and policymakers from the Euro-Mediterranean region responsible for the conception, planning and implementation of labour and migration policies.

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## ACRONYMS

|        |  |
|--------|--|
| AfDB   | African Development Bank   |
| ALMP   | Active Labour Market Programme   |
| ANAPEC | The National Agency for the Promotion of Employment and Skills (Morocco)   |
| ANETI  | The National Agency for Employment and Self-employment<br>(Agence Nationale pour l'Emploi et le Travail Indépendant) |
| APII   | Agency for the Promotion of Industry and Innovation (Tunisia)  |
| ATCT   | Agency for Technical Cooperation (Agence Tunisienne de Coopération Technique)  |
| ATFP   | Tunisian Agency for Vocational Training  |
| BTP    | Brevet de Technicien Professionnel   |
| BTS    | Brevet de Technicien Supérieur   |
| CAP    | Professional Aptitude Certificate (Certificat d'Aptitude Professionnelle)  |
| CAPMAS | Central Agency for Public Mobilization and Statistics  |
| CC     | Skills certificate (Certificat de Compétence)  |
| CCG    | Central Guarantee Fund (Caisse Centrale de Garantie)   |
| CCME   | Conseil de la Communauté Marocaine à L'étranger  |
| CDD    | Fixed-term contracts   |
| CDI    | Open-ended contracts   |
| CGEM   | The General Confederation of Companies (La Confédération Générale des Entreprises du Maroc)                          |
| CI     | Contrat d'insertion (integration contract)   |
| CNFCPP | National Continuing Education Centre and Professional Promotion  |
| CNSS   | The National Fund for Social Security (La Caisse Nationale de Sécurité Sociale)                                      |
| CRES   | Centre for Research and Social Studies (Tunisia)   |
| CTVIE  | Tunisian Centre for Economic Intelligence and Monitoring<br>(Centre tunisien de veille et d'intelligence économique) |
| DCI    | Development cooperation instrument   |
| DoS    | Department of Statistics (Jordan)  |
| ECES   | The Egyptian Center for Economic Studies   |
| EJMT   | Egypt Jordan Morocco Tunisia   |
| EMP    | Euro-Mediterranean Partnership   |
| ENP    | European Neighbourhood Policy  |
| ERF    | Economic Research Forum  |
| ETF    | European Training Foundation   |
| ETP    | Employment Training Programmes   |
| FCE    | Contracted Training for Employment (Formation Contractualisée pour l'Emploi)   |
| FQR    | Qualifying training or retraining (Formations qualifiante ou de reconversion)  |
| ESF    | Training to support emerging sectors (Formation au profit des secteurs émergents)                                    |
| GIZ    | Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH   |
| GME    | Large and medium-sized businesses (grandes et moyennes entreprises)  |
| GoE    | Government of Egypt  |
| HCP    | Higher Planning Commission (Haut Commissariat au Plan)   |
| HCR    | Haut-commissariat des Nations Unies pour les Réfugiés (UNHCR)  |
| IACE   | Arab Institute of Business Managers (Institut Arabe des Chefs d'Entreprise)  |
| ICLS   | International Conference of Labour Statisticians   |
| IDSC   | Information and Decision Support Center  |
| ILO    | International Labour Organization  |
| IMF    | International Monetary Fund  |
| INDH   | L'initiative Nationale pour le développement Humain (National Initiative for Human Development)                      |
| INS    | National Institute of Statistics (Tunisia; Institut National de la Statistique)                                      |
| IOM    | International Organization for Migration   |
| IPST   | The Institute for the Promotion of Teaching Science and Technology   |
| LEMMA  | Ensemble Pour la Mobilité (Support for the EU-Tunisia Mobility Partnership)  |
| MAE    | Ministry of Foreign Affairs (Tunisia)  |
| MAS    | Ministry of Social Affairs   |
| MDM    | Moroccans of the World   |
| MFPE   | Ministry of Vocational Training and Employment (Tunisia)   |
| MFPE   | Ministry of Vocational Training and Employment (Tunisia)   |
| MS     | Member States of the European Union  |

|        |   |
|--------|---|
| MTIP   | The Ministry of Labor and Professional Integration (Morocco)  |
| NASS   | National Academy for Science and Skills   |
| NEET   | Not in Employment Education or Training   |
| NSHRD  | National Strategy for Human Resource Development (Jordan)   |
| OECD   | Organisation for Economic Co-operation and Development  |
| OFII   | Office Français de L'immigration et de L'intégration  |
| OPFPT  | Office of Professional Training and Work Promotion (Morocco)  |
| OPFPT  | The Office of Vocational Training and Promotion of Work (Morocco)   |
| ONEQ   | National Observatory of Employment and Skills   |
| ONM    | National Observatory on Migration   |
| OTE    | Tunisians Abroad Office   |
| PIMA   | Public Investment Management Assessment   |
| SEITE  | Secretary of State for Immigration and Tunisians Abroad   |
| SFD    | Social Fund for Development   |
| SNIA   | The National Immigration and Asylum Strategy  |
| STA    | Sewedy Technical Academy  |
| STEM   | Science, Technology, Engineering and Mathematics  |
| TFP    | Vocational Training Tax (Tunisia)   |
| TLMPS  | Tunisian Labor Market Panel Survey  |
| TPE    | Very Small Businesses (Toutes Petites Entreprises)  |
| TPME   | Very Small Businesses and Small and Medium-sized Businesses<br>(Très Petites Entreprises & Petites et Moyennes Entreprises) |
| TVET   | Technical and Vocational Educational and Training   |
| UAE    | United Arab Emirates  |
| UN     | United Nations  |
| UNDP   | United Nations Development Programme  |
| UNHCR  | United Nations High Commissioner for Refugees   |
| UNICEF | United Nations International Children's Emergency Fund  |
| USA    | United States of America  |
| USAID  | United States Agency International Development  |
| USD    | United States Dollar  |
| VET    | Vocational Educational and Training   |

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# I. Introduction

With the aim of contributing to the objective of EUROMED Migration IV, this report addresses the need for constant and informed adjustment of national and regional migration policies. This is in line with the project's objective of establishing a comprehensive, constructive and operational dialogue and cooperation framework, with particular focus on reinforcing instruments and capacities to develop and implement evidence-based and coherent migration and international protection policies.

The MENA region continues to be a source of skilled labour, reflected in the outflow of skilled Arab workers to European or Gulf countries. The region is therefore one that generally produces migrants, receives migrants and also one that migrants pass through on their way to other destinations. With these historical migration patterns, labour migration in the region has not yet lived up to its full potential. The main evidence for this is the mismatch between educational and vocational training on the one hand and labour market outcomes on the other, along with demographic and economic characteristics and types and patterns of labour migration.

The labour markets of the non-oil countries of the MENA region play a significant role in shaping and managing the migration process. With the populations of the region growing at a high rate (compared to the rates in Europe), the countries of the region have witnessed remarkable improvements in access to education among their young populations. Access to basic education, secondary and higher tertiary education has significantly improved.

Labour markets, on the other hand, have limited capacity to absorb this increasingly educated workforce. As a result, unemployment rates among the highly educated have been recorded at 20 percent for **Egypt**, 15.8 percent for **Jordan**, 21.1 percent for **Morocco** and 30.2 percent for **Tunisia**. This shows that a negative correlation exists between the education levels and the unemployment rates, resulting in unemployment mostly affecting the highly educated among young people. This correlation refers to a failure in matching between the education outcomes and the demand in the labour market. This mismatch has not only been reflected in the countries within the region, but also across borders, affecting the labour markets of other regions, the main hosts of migrants.

This report provides a country-specific study of the relationship between the labour mismatch and migration in selected countries in the region. The report explores the cases of Egypt, Jordan, Morocco and Tunisia (EJMT for the purpose of this report). These four countries have been selected given their significance in the migration context in the region, not only as countries both sending and receiving migrants, but also and transit countries in some cases. Historical and cultural factors have contributed to both similarities and differences in a migration context, shaping the purpose of migration policymaking and its implementation in each country.

The main common feature between the four countries is the increased enrolment in tertiary education. However, the resources acquired through investment in education is unfortunately wasted given the high unemployment rates among educated people. This mismatch has had repercussions for the labour markets in the selected countries. These repercussions range from high unemployment among the educated youth, or acceptance of lower skilled jobs, therefore crowding out the lower skilled workers.

From this perspective, labour market mismatch is considered one of the most alarming common features between the selected countries. This mismatch further contributes to stunted economic growth arising from the productivity losses due to the lack of full use of the available resources. The mismatches identified in the MENA labour markets are not only supply driven but also demand driven. The structure of the MENA economies does not absorb enough of the educated working-age population. This is mainly reflected as economic growth in sectors not absorbing many of the educated young people.

Labour migration is believed to relieve heavy pressure on the local labour markets. Absorbing from the pool of the unemployed and the underemployed in the specified labour markets, while adding to the unmet demand in the labour markets in the recipient countries. Accordingly, the most commonly identified driving factors in the MENA countries of origin have been the misplacement of the working youth in jobs that are considered second class, less prestigious and low paying. The search for international employment is mostly among the young working-age population that has failed to be fully integrated by their labour markets. On the other hand, it addresses the demand for labour in other destination countries, including in Europe, recruiting workers for jobs in both highly-skilled occupations and low-skilled ones that cannot be fulfilled by native labour supply.

Political and social developments over the past decade in the MENA region have greatly impacted the volume, nature and drivers of migration flows in the Euro-Mediterranean region. This situation has brought the topic of migration to the forefront of regional and national discussions. This necessitates a constant adjustment of national and regional policy interventions in the field of migration.

The mismatch between education, vocational training and labour market systems, the demographic and economic situation and the most common types and patterns of labour migration are the reasons why labour migration in the region has not yet lived up to its full potential. This necessitated the development of dialogue and cooperation between the countries concerned to ensure that the benefits of migration are spread across source and recipient countries.

The current report is about understanding the labour market conditions in the four selected non-oil MENA countries, Egypt, Jordan, Morocco and Tunisia as source, transit and recipient countries. It is highly believed that labour market conditions, specifically the mismatch between education and job opportunities, are one of the main reasons for outward migration in the region. This report, therefore, works towards achieving three main objectives, via which a number of research questions are highlighted:

**Objective 1:** To understand and analyse the mismatch between education/vocational training and the labour market in the countries selected

**Objective 2:** To analyse access of migrants to the labour market in the MENA countries

**Objective 3:** To analyse the labour market policies and the migration policies and the integration and coordination, or lack of, between one another.

In achieving these objectives, the report answers the following research questions:

1. What is the current up-to-date status of employment creation in the MENA countries selected?
2. What is the employment policy framework, the main implementing institutions and the main labour market legislation in the MENA countries selected?
3. What is the extent of the mismatch between education and job opportunities in the MENA countries selected?
4. What are the current national efforts to respond to the challenge of mismatching?
5. What are the numbers and flows of migrants and their access to the labour market in the MENA countries selected?
6. What does the vocational training system look like in the MENA countries selected?
7. What is the relationship between formal and informal labour matching?

After this short introductory chapter, this report consists of seven chapters. Chapter two provides the current demographic and macroeconomic conditions in EJMT. Chapter three analyses the current human capital, labour markets and mismatch. Chapter four provides an overview of international migration in EJMT. Chapters five touches upon the drivers of migration and migration and development. Chapter six discusses migration governance in EJMT. Chapter seven discusses the labour mismatch and migration policies for foreigners in EJMT. Finally, chapter eight provides some recommendations for improved migration governance.

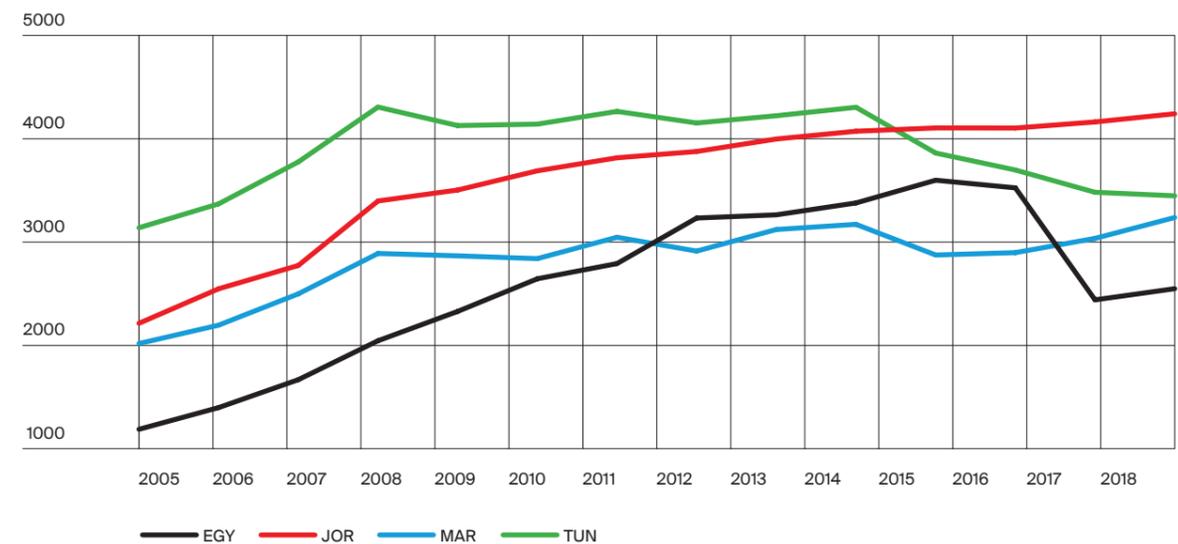
# II. Demographic and macroeconomic conditions

## A Macroeconomic indicators

The non-oil MENA economies have been experiencing largely fluctuating economies since the early 2000s. The four countries are considered “middle income countries” by the World Bank. The gross domestic product (GDP) per capita (US current prices) in 2018 has been the lowest in Egypt and the highest was experienced in Jordan. Tunisia and Morocco have had similar experiences. Figure 1 below shows the GDP per capita for the four countries over the period from 2005–2018.

Figure 1: GDP per capita in current \$ (bn)

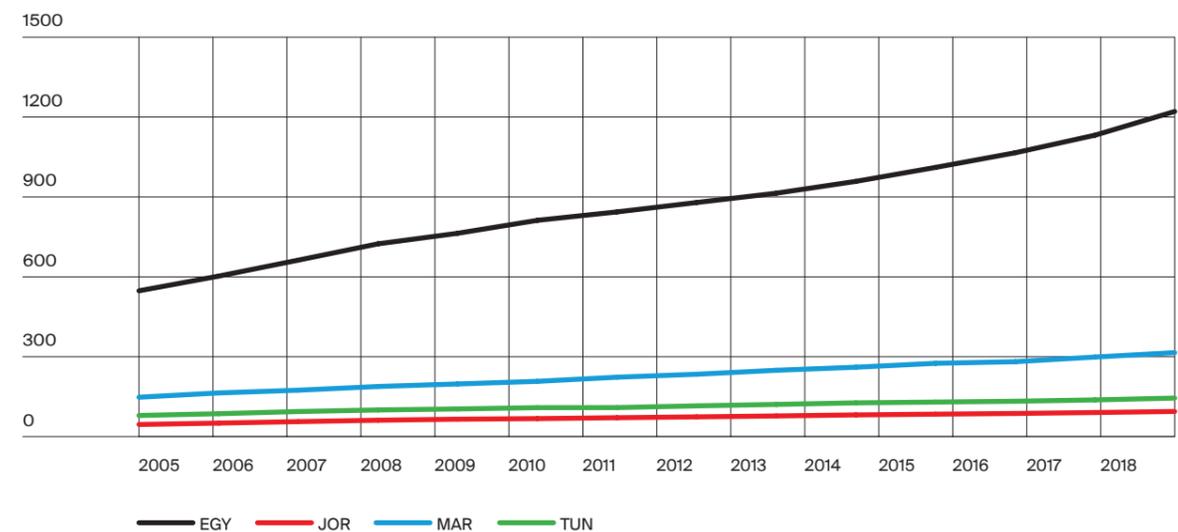
Source: Author's own calculations using World Bank data (2018)



The GDP per capita trend shows that **Egypt** has generally been the worst performer regarding GDP per capita over the years, only surpassing the rates for Morocco from 2011 to 2016. Figure 2 below shows that an opposite trend is being experienced for GDP (current \$ bn). Egypt has been experiencing the highest GDP in PPP terms over the years. Even with the severe downturn experienced in 2017 driven by the devaluation of the Egyptian pound, Egypt has been the best performer, with respect to its GDP, when compared to the other countries.

Figure 2: GDP (PPP) in current \$ (bn)

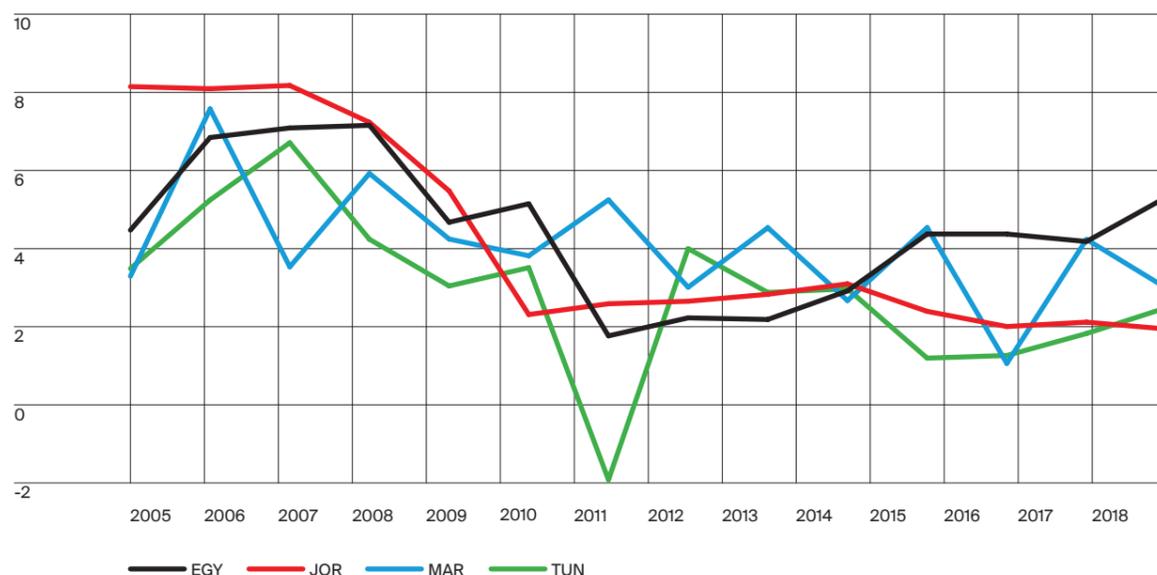
Source: Author's own calculation using World Bank data (2018)



Economic and non-economic reasons have worked together to explain this trend in the economic performance of the countries selected. The GDP growth rates is reflected in the severe fluctuations experienced by the different countries at different points in time. These fluctuations strongly reflect the macroeconomic effects of these economic and non-economic reasons. Figure 3 below shows the GDP growth rates (current \$) for the four countries. The recent economic trajectories of the MENA countries selected can therefore be divided into two distinct phases: the first over the period 2008–2011 and the second starting in 2011/12 and ending in 2018.<sup>1</sup>

Figure 3: GDP growth rate (current \$)

Source: Author's own calculation using World Bank data (2018)



### Phase I (2008–2011)

Severe economic slowdown was experienced in Morocco, Tunisia and Egypt at the time of the global financial crisis. The situation for Tunisia was exacerbated by the mining basin uprising taking place around the same time, which contributed to the slowing down of the Tunisian economy. The economic slowdown in Jordan was steady until 2008, when a sharp drop was experienced and the economy only recovered slightly again in 2010.

Despite the 2008 global economic recession, the economic performance of **Egypt** flourished during the years leading up to the 2011 revolution. Real GDP experienced significant growth over the period 2005 to 2010, starting at 4.5 percent in 2005 and reaching its highest in 2008 at 7.2 percent, which was considered to be among the highest in the MENA region.

Very slow and stable growth was experienced in **Jordan** starting in 2010. The Syrian crisis did not allow much revival time for the Jordanian economy. Economic trade with Syria and the influx of Syrian refugees have contributed to another round of economic slowdown. Concurrently, a decline in energy supply from Egypt and a rising energy bill have worsened the situation due to the effect on the industrial sector.

Around the same period, and starting in 2008, the **Moroccan** economy has witnessed a drop in economic growth compared to the previous decade. This slowdown was driven mainly by a significant drop in domestic demand (final household consumption and investment).

<sup>1</sup> 2018 is the last year when official data is recorded for the four countries

### Phase II (2011–2018)

The second phase of fluctuations in the economic performance of countries was in the wake of 2011. The Egyptian and Tunisian revolutions had a negative impact on their economies with the macroeconomic indicators showing a downward trend.

The **Tunisian** economy was exposed to several economic shocks. Growth in 2011 fell dramatically and negative growth was recorded, only to slightly increase, but never exceeding 2.5 percent over the entire period from 2011 to 2019.<sup>2</sup> Successive terrorist attacks and the disruption to Tunisia's phosphate production contributed significantly to the slowdown in growth experienced from 2015 to 2017. The balance of payments deficit and the simultaneous drop in the rate of savings together widened the financial gap between investment and savings.<sup>3</sup>

**Egypt**, experiencing a similar political and security situation, experienced economic slowdowns driven by the consequences of the 2011 events.<sup>4</sup> The economic position of Egypt plummeted sharply after the revolution. The macro-economic indicators had deteriorated substantially. Egypt's economy continued in its state of instability for a considerable period of time. Over the years and with the concurrent instability in the political situation in Egypt, real economic reforms were not possible.

By 2014, the current regime was elected, and it took upon itself to conduct much-needed economic reform. The government took considerable steps to increase political stability in order to pave the way for the economic reforms. With a huge emphasis on security and infrastructure (roads and power plants for example), the Government of Egypt (GoE) provided the means needed to ensure a suitable environment for further economic development.

The flourishing of macro-economic indicators, as seen in the improvement in GDP and GDP growth rates, together with the decline in inflation rates and unemployment rates, are all signs of economic revival. Additionally, revenues from Tourism, the Suez Canal and remittances of Egyptians abroad, being the main sources of foreign currency, are all showing positive trends. The social conditions, however, still remain difficult. Inflation, poverty and unemployment, especially among the young, are still showing significantly high, and in some cases increasing, numbers. This laid-back reaction of the micro-economic indicators necessitates a thorough study of the demographic structure of Egypt. Classified by the World Bank as a lower-middle income country<sup>5</sup>, the **Jordanian** economy is a small, open, service-oriented economy with abundant skilled human resources, limited natural resources and dependent on workers' remittances and foreign aid. Since 2010, the Jordanian economy has been growing at a slower rate compared with the population, led by the services sector, accounting for approximately 60 percent of GDP. The overdependence on workers' remittances and foreign aid has made the economy vulnerable to external shocks.

With the Arab Spring and the escalating situation in Syria, Jordan's weakened economy persisted between 2012 and 2013 and extended to between 2014 and 2016. The consequent fall in oil prices and the growth in the real estate and the tourism sectors, driven by government incentives, resulted in a small increase in economic growth between 2016 and 2017. Economic growth at that time was positive, led by the mining and quarrying sectors, construction, wholesale and retail.

### Economic reforms

In response to the substantial fluctuations and the slowdown in the economic activity of most of the countries in the MENA region, MENA countries embarked upon reform programmes, either nationally driven reforms, or plans devised by international institutions that were adopted and implemented by the state government. The primary aims of these economic reforms were twofold across the countries, improving the macroeconomic indicators of the country and addressing the social safety of the citizens to mitigate the impacts of the economic reforms on their quality of life and standard of living.

<sup>2</sup> An exception took place in 2012, where economic growth rate recorded a high of 3.9 percent.

<sup>3</sup> Rapport annuel de la Banque centrale, Juin 2019.

<sup>4</sup> Egypt had suffered from a number of events since 2011, starting with the revolution, followed by political instability and lack of security that greatly affected the economy at micro and the macro levels. A transitional period, then a failed presidency followed by another transitional period, until finally reaching some degree of stability.

<sup>5</sup> In 2017, Jordan has been re-classified by the World Bank as a lower-middle-income country, down from upper-middle-income country

In **Tunisia**, in response to the ailing economic situation, the government had been initiating, since 2016, a series of structural economic reforms to improve the business environment and enhance the private sector's capacity to absorb unemployment, especially among young graduates. Despite these reforms, the Tunisian economy continued to suffer from low-productivity economic activities (World Bank 2014a, Nabi 2019).

The year 2005 marked the transition of the reforms environment in **Jordan** from IMF adjustment programmes to the implementation of home-grown reform programmes. These adjustment reforms that started in 1989 and lasted until 2004 had a positive impact on the country's macroeconomic indicators. GDP growth did an about-turn, from negative rates to positive ones, and inflation dropped significantly along with the budget deficit and the external debt. Foreign reserves experienced a significant increase.

The Jordanian government proposed further economic measures in 2012, involving a number of policies that were classified as fiscal, involving energy, monetary and exchange rates, the financial sector and growth-enhancing policies. These policies emphasised reducing the budget deficit and public sector losses, maintaining the exchange rate to safeguard against inflation and boosting the capacity to produce and export. Despite the many efforts, the policies did not bring about the aspired to economic growth and prosperity. It was only in 2016 that the Jordanian economy started to witness economic growth and to bring inflation under control while strengthening the financial sector and increasing foreign reserves.

Macroeconomic stability in **Egypt** faces a substantial challenge in the shape of the volatile exchange rate, causing disrupted planning for the entire business sector. Along with the concurrent political instability in Egypt, real economic reforms proved impossible. By 2014, the current regime took it upon itself to conduct much-needed economic reform. The government took considerable steps to increase political stability in order to pave the way for the economic reforms. With a major emphasis on security and infrastructure, the GoE provided the means needed for a suitable environment for further economic development.

With the economic reforms having the blessing of the IMF, the Egyptian economy eventually started to flourish at macro level. Real GDP growth rate saw a significant rise, while unemployment and inflation rates were brought under control. The post-revolution instability, public investment, private consumption and the export of goods and services in addition to the narrowing of the current account deficit, primarily driven by remittances and tourism revenues, limited the role of the private sector in worsening the Egyptian economy's macroeconomic indicators. The macroeconomic reforms, together with the energy subsidy reform and the control of the public sector wage bill as well as the Government of Egypt's efforts<sup>6</sup> to improve the business environment, all helped lay the foundations for further private sector investment.

### Leading sectors

The economic growth experienced at different points in time by the countries of the region is highly led by the growth and the revival of economic sectors. These economic sectors differ from one country to the other. In general, the agricultural sector has been leading the economic growth in Morocco and Tunisia, while the services sector has been leading the growth in Egypt and Jordan.

On a more detailed analysis, tourism, natural gas, trade, real estate and construction and non-petroleum manufacturing are considered the main sectors driving economic growth in **Egypt** in 2019. Accordingly, services have increased their contribution to GDP while the contribution from industry and agriculture has declined. In the future plans of the country, the state has identified the leading role of petroleum production, manufacturing, construction and wholesale and retail trade sectors in driving further economic growth in Egypt.

The consequent falling oil prices and the growth in the real estate and the tourism sectors driven by government incentives resulted in a small increase in economic growth in **Jordan** between 2016 and 2017. Economic growth at that time was positive, led by the mining and quarrying sectors, construction, wholesale and retail. By 2019, the Jordanian economy's growth was led by the growth in the services sector. On the other hand, the contribution of industry and agriculture have contributed only minimally to growth. The manufacturing sector has seen a decline in 2019, as opposed to mining and quarrying, electricity and gas.

The **Moroccan** economy is primarily an agrarian economy, with the agricultural sector employing approximately 40 percent of the Moroccan workforce. The contribution of the agricultural sector varies from year to year depending on climatic conditions. This seasonality and fluctuations in the sector has driven the sharp fluctuation in the growth rates of the economy. The secondary and tertiary sectors, however, are more stable.

The contraction of the agrarian and the industrial (mainly the oil and gas and agrobusiness) sectors in **Tunisia** in 2011 and the start of the revolution contributed significantly to the decline in economic growth. The growth in the services sector managed to compensate for the slowdown driven by the other sectors. Further expected economic growth is predicted to be driven by reforms and improvements in the agriculture, manufacturing and tourism sectors.

## B Demographic trends

### i. Demographic change and demographic dividend

Demographic change is a powerful development factor that operates through a number of channels. Economic growth is influenced by the size of the labour force, human capital and exogenous technological changes. The substantial changes in the age structures of the population of the developed and the developing countries in the world have important implications for economic growth. An increase in the share of the working age population is a phase that all countries of the world goes through at some point in their existence. This increase in the working age population, known as the first demographic dividend, should lead to an increase in the output per capita which is expected have a positive impact on the economic growth of countries. This first demographic dividend is a phase in the demographic change of countries and this phase is expected to last for decades. Eventually, as this working age population starts to age, the share of the working age population starts to fall again.

Different countries of the world are at different stages of their demographic change and have experienced the first demographic dividend at their own pace. Looking specifically at countries in the MENA region, it can be seen that all countries in the region are currently in their third stage of their demographic change. However, what makes each country different from the other is the size of the population relative to its own labour market capacity, as well as the age distribution of the population.

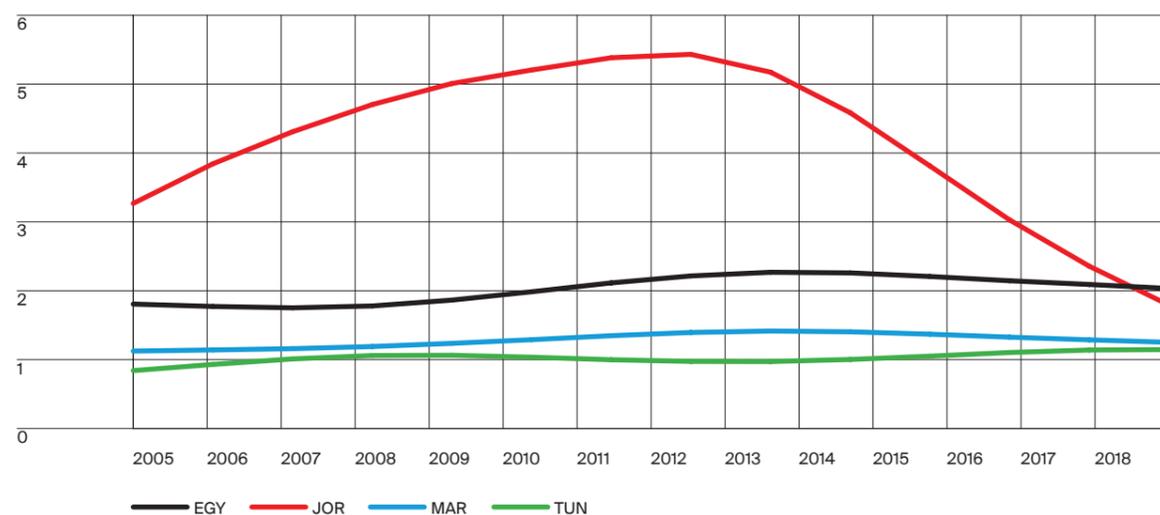
<sup>6</sup> These efforts involved the Investment Act, the Industrial Licensing Act and the Progressive Insolvency Act

Developing countries generally experience a demographic change as they develop, moving from high to low mortality rates and fertility rates. The four countries selected for the analysis are currently in their third stage of their demographic change. Even though this is the stage where countries usually realise their demographic dividend, the countries selected in the region have not managed to realise or benefit from this dividend.

Figure 4 below shows the population growth rates experienced in the four countries of interest. This figure shows that the populations of the four countries have been growing at rates not very different from one another, with the exception of Jordan. The Jordanian population has been growing at a fast rate throughout its recent history, reaching a maximum of 5.4 percent per year.<sup>7</sup> However, the growth of the Jordanian population experienced a significant slowdown in 2018, coming close to 1.8 percent per year.<sup>8</sup>

Figure 4: Population growth rate (2005–2018)

Source: Author's own calculations using World Bank data (2018)



**Egypt** is the most populous Arab country with the population growing rapidly at a rate of 2 percent per annum in 2019 (Worldometers, 2020).<sup>9</sup> This rate is a good deal more than the global population growth rate of 1.2 percent per annum. Egypt has experienced a significant drop in its fertility rates<sup>10</sup>, however this drop is still lagging behind the drop in mortality rates, resulting in a situation of rapid population growth. This situation has created a bulge in Egypt's population. This youth bulge made its way to the working age population around 2009, with its effects being echoed in the labour market throughout the 2010 decade. The Egyptian Government has been making great efforts throughout the past decades to bring the population growth rates under control. These efforts include the family planning policies that have not proved to be successful in curbing population growth. This failure has led to Egypt being ranked as the 14<sup>th</sup> most populous country in the world, with a current total population of approximately 100 million people.

The **Jordanian** population is also classified as a young population, with working age population (15–64 years) accounting for over 60 percent. The Jordanian population has been growing at a high rate. The current population structure includes at least 30 percent of the Jordanian population residing outside of Jordan. Starting in 2015, Jordan has been experiencing a bounce in the population growth rate, reaching a rate of 5.3 percent, which is primarily attributable to the influx of refugees to Jordan due to the Syrian crisis.

<sup>7</sup> The high population growth rate in Jordan is mainly attributed to migration; mainly to Syrian refugees.

<sup>8</sup> The current population growth rate in Jordan is now attributed mainly to the difference between births and deaths (natural increase) which is similar to, or close to, the other three countries.

<sup>9</sup> This population growth rate has declined from 2.29 in 2013 and 2.7–2.8 in the late 1980s, with Egypt's lowest level being 1.7 in the 1960s.

<sup>10</sup> Fertility rates in Egypt dropped from 5.3 in the 1980s to 3.0 in 2008 with a slight increase to 3.5 in 2019.

**Tunisia**, unlike Egypt and Jordan, has managed to bring its population growth under control and has been moving steadily towards a demographic dividend ahead of many countries in the region with similar income levels. The decreasing growth of the working age population coupled with decreasing fertility and mortality rates show that Tunisia has, from a demographic perspective reached the stage of demographic dividend (Bloom *et al.* 2003).

The Tunisian population had been growing at approximately 3 percent per year until the year 2000 when population growth slowed down, reaching approximately 1 percent, decreasing further to 0.75 in 2003 before increasing slightly to 1.15 percent in 2018. The country has managed to bring population growth under control by successfully implementing family planning programmes that have managed to reduce fertility rates from more than seven children per woman in 1965 to fewer than two children per woman 40 years later.

Population dynamics in **Morocco** have been characterised by rapid population growth since the beginning of the last century. The size of the population has increased significantly from 11.6 million in 1960, to 15.3 million in 1970. Continuing its increase, the Moroccan population reached 34 million in 2014 and 35.3 million in 2019.<sup>11</sup> An average annual increase of 1.02 percent was achieved in 2014, compared with an average annual increase of 1.38 percent and 1.25 percent respectively during the intercensal periods of 1994–2005 and 2005–2014 respectively. According to HCP projections, this rate of population growth will decelerate continuously reaching 0.52 percent between the years 2030 and 2050.

## ii. Age structure of the population distribution

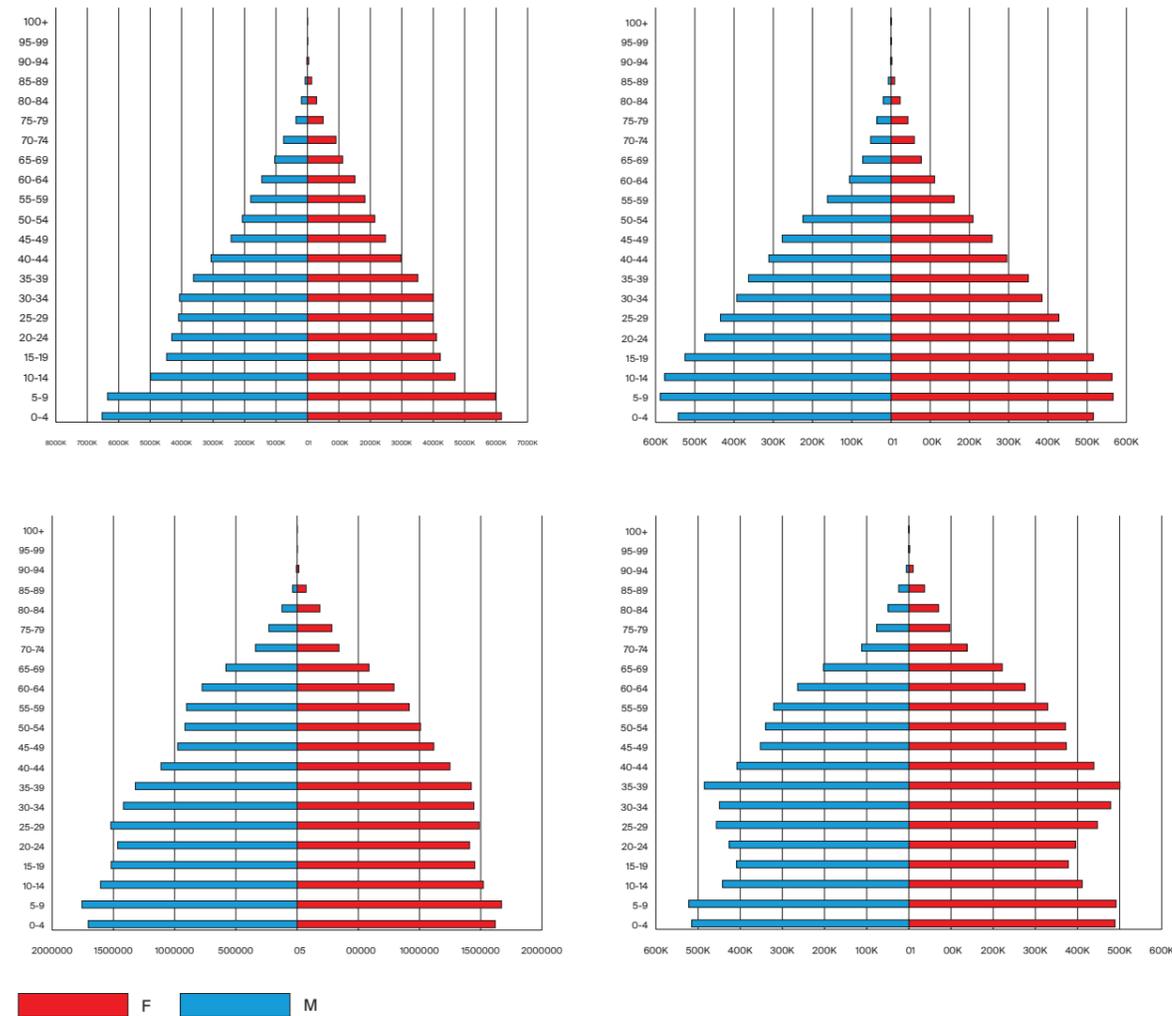
According to Bloom *et al.* (2003) and Bloom (2017), the decline in fertility tends to foster female labour force participation, and allows families and governments to invest more in health, child education (Becker and Lewis, 1973) and human capital, particularly the youth population. Countries, at this stage, have the opportunity to transform the demographic dividend into an economic dividend (Mason, 2003).

The expanding working age population is expected to contribute to economic growth only when proper investment in the human capital is taking place. This investment must include not only education, but also employment where the latter acts as an empowering tool to employment. Therefore, we cannot consider the demographic dividend an automatic transition to economic growth driven by the large working age population. Economic growth only occurs if countries can ensure investment in education as well as the right policies and macroeconomic environment that ensures reaping the benefits and realising the returns to the investment in this education in employment.

Figure 5 below shows the demographic composition of the four MENA countries in 2020. The population pyramids, showing the gender composition of the population by age groups of 5 years, each show different patterns across the four countries. These differing patterns are initially driven by the birth and death rates, but also by the hidden momentum of population growth and its effect on the size of the working age population.

The bottom of the population pyramid shows the similarity between Egypt and Tunisia in terms of having a relatively wider base, reflecting a large number of births, compared to their own previous generations. The pyramids for Morocco and Jordan show that they have already gone through this large number of births in a previous generation, where the bulge is in the five to nine age group, as opposed to the zero to four for Egypt and Tunisia. Additionally, the working age population forms a larger part of the population distribution in Morocco and Tunisia compared with Egypt and Jordan. The situation in Jordan is largely driven by the influx of Syrian refugees. On the other hand, the situation in Egypt is driven by changes in the national structure of the population.

Figure 5: Population distribution by age group and gender



**Egypt's** population structure is considered one of the most unique in the region. Being the most populous Arab country in the region, not only is the total population of concern, but the distribution of this population also plays a more significant role in the economic growth and development of the country. According to UN estimates, approximately 33 percent of the Egyptian population is below the age of 14, with a median population age of 24.6 years. The young population of Egypt is primarily due to population momentum, an extended period of high fertility rates and rapid population growth.

The young population of Egypt presents a number of challenges, summed up as education (enrolment and quality), job opportunities, unemployment (especially among young people) and improving living standards. The declining capacity of the public sector and the pressures and challenges facing the private sector driven by the economic and political instability in 2011 have all affected youth employability in Egypt. The informal private sector has provided the main local labour market or the majority of the new entrants to the labour market.

#### The role of public sector employment in Egypt

*Understanding the impact of this demographic structure on the labour market in Egypt necessitates a revision of the education and employment policies and programmes implemented in the 1950s. During the late 1950s (1956–59), a series of nationalisation programmes led to the expansion of the public sector. The government embarked on an employment drive for the annual creation of new jobs by state-owned enterprises. This increased the employability of educated young people in the government and public sector. The government was able to keep its promise so long as the number of graduates was limited and government revenues were maintained. Starting in the mid-1980s, with the fall in oil prices, the financial pressures and the rise in the number of educated young people, the government has altered its commitment. This has led to a dramatic contraction in public sector hiring.*

Another consequence of the dominance of the working age group in the Egyptian population is the resulting effect on birth rates. In a society where marriage is almost universal, and is the main signifier of adulthood, young people assume their roles as parents. With the continued prevalence of early marriage and with the natural growth in the number of women of child-bearing age, an extension of reproductive years for women is expected, creating a new baby boom acting as a consequence of the youth bulge. Egypt's 2017 population census and the population structure in 2020 have confirmed this and the bulge is currently taking place in the 0–9 age group. The youth bulge is therefore inevitably followed by another bulge (a consequence of the previous one) which poses new challenges for Egypt with regards to the education and labour market systems.

In light of the slowdown in the **Tunisian** population growth rate, the proportion of the working age population (15–64) decreased from 70 percent in 2007 to around 67 percent in 2017. This slowed growth has resulted from a significant decrease in the population share for young people (15–29) from 32 percent in 2007 to 22 percent in 2017 compared with a slight increase in the 30–44 (from 21 percent to 23 percent) and 45–64 (17 percent to 21 percent) age groups. Despite the fact that Tunisia seems to have great potential for enjoying a demographic dividend, economic indicators (high levels of youth unemployment, low female labour force participation rate, high poverty rate, etc.) indicate otherwise.

The structure of the **Jordanian** population shows the high dependency ratio that characterises Jordanian society.<sup>12</sup> Additionally, employment rates among Jordanians have reached only 22.1 percent of the workforce. This low employment rate has pushed the active dependency ratio to almost 78 persons per 100 employed Jordanians (HPC, 2017). Not having the necessary economic infrastructure to absorb this demographic structure, the result is unemployment, poverty, a decline in the per capita income, deterioration in living standards, and increasing pressures on resources. This deterioration in the macroeconomic indicators negatively affects the wellbeing of people, where the spread of poor health and social diseases are the main cost.

In the coming 25 years, the proportion of young people in the Jordanian population is expected to decrease, with an impact on their employment.<sup>13</sup> The dependency rates are expected to decline, enabling further increases in economic growth.<sup>14</sup> This demographic structure is temporary as these age groups change over time, people approach the retirement age, again increasing the dependency ratios and exerting extra pressure on economic growth and income generation.

The proportion of young people in the population (under the age of 15) in **Morocco** has fallen significantly from 44.4 percent in 1960 to 28.2 percent in 2014, in a population that has been growing steadily between the two periods. This proportion of young people is projected to continue falling to 24.1, 21.7 and 17.9 percent of the population in 2025, 2030 and 2050 respectively.

Unlike Egypt and Jordan, and to a lesser extent Tunisia, the ageing of the population remains a major trend in the structural transformation of Moroccan demography. The relative weighting of the “60 and above” age group has increased remarkably, from 7.2 percent in 1960 to 10.9 percent in 2019, a high proportion that is expected to continue rising to 15.4 percent in 2030 and 23.2 percent in 2050.

The proportion of people of working age or potentially productive (15–34 years) has increased from 30.8 percent in 1960 to a maximum of 37.3 percent in 1994. The proportion for this group has started to fall since then, reaching 36.7 percent in 2005 and 34.5 percent in 2019. This rate is expected to continue falling to 32.2 percent and 25.5 percent in 2030 and 2050 respectively, according to HCP projections. On the other hand, the proportion of the 35–59 age group has increased in the past and is expected to continue to increase. This structure will place strong demographic pressure on the labour market over the next ten years. It is therefore this age group that should be the focus of the public authorities.

The young population represents both an opportunity for and a burden on the national economies.<sup>15</sup> The young population of the MENA countries could represent a great opportunity to advance the development of the economies and wellbeing of the populations. The extent of these opportunities depends on the right policies, education and labour market policies, and their ability to include the young people in the economic, social and political spheres at national level and turn this young labour force into employment growth. Any exclusion and

12 The dependency ratio has reached approximately 60 persons per 100 persons of working age.

13 The proportion of adult unemployment is expected to increase given the expected increase in the median age from 22.1 years to 34.9 years.

14 With a suitable economic environment, allowing for income generation and increased marginal propensity to save, with these savings being translated into investments, economic growth is expected.

15 The youth bulge acts as an opportunity by providing a pool of individuals contributing to the human capital of the country. A burden happens when the infrastructure (including education and health) is not efficiently improving the quality of the human capital.

marginalisation of the youth population from the economic, social and political spheres could pose a threat to the region's social stability. Differences in the demographic structure is guiding labour force growth and projections, and will make a difference to migration. Population pyramids for all four countries for the period 1960–2020, in addition to projections until the year 2050, are contained in **Annexe 3**.

The policies in some of the MENA countries have initially failed to socially, politically and economically integrate young people, until later when policy framework started to shift attention to this dynamic age group. This situation is reflected in other labour market outcomes, including unemployment, informality and migration.

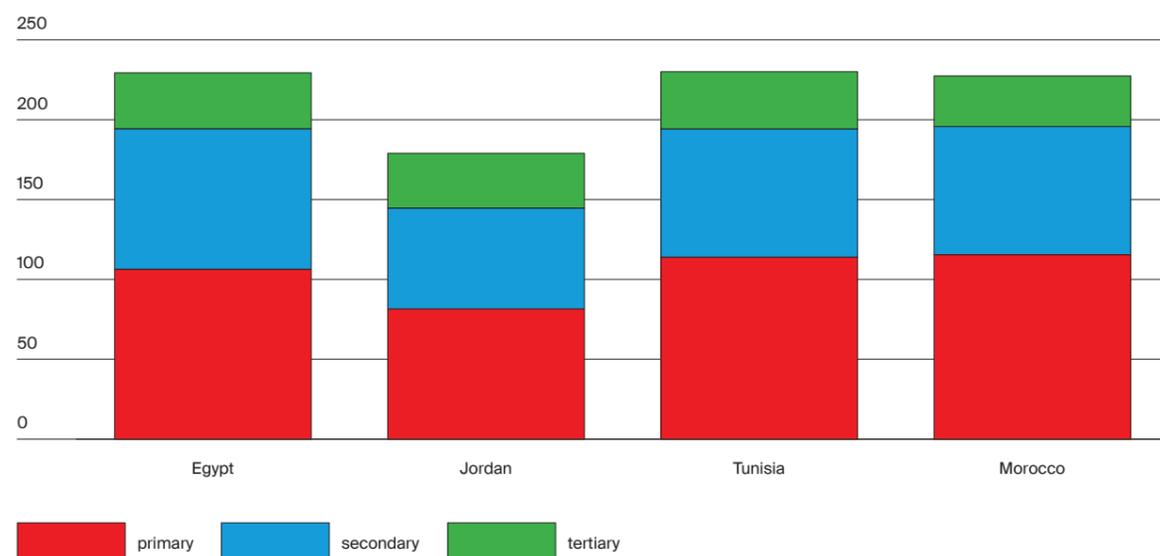
## C Education trends

The link between human capital accumulation and macroeconomic performance has been continuously emphasised in international literature (e.g. Barro 2001<sup>16</sup>). Education increases the national economy's productivity, where economic growth is positively related to the average years of school attainment and therefore makes it more attractive to foreign direct investment.

Gross enrolment rates at the different levels of education have remained comparable for the MENA countries selected. The gross enrolment rate in tertiary education has recorded levels close to 30 percent for the MENA countries selected.<sup>17</sup> Figure 6 below shows the school enrolment rates in the three levels of education (primary, secondary and tertiary) for 2018. The figure shows the lesser significance of the tertiary education system when compared to the primary and the secondary systems. This shows that fewer people continue until they reach the higher levels of education. Although the differences in the gross school enrolment rates is not significant, the outcomes from the education system have varied, giving rise to different labour market consequences.

Figure 6: School enrolment in 2018

Source: Author's own calculations using World Bank data (2018)



16 Barro, Robert, J. (2001) Human Capital and Growth. *American Economic Review*, 91(2), 12–17

17 The rates for 2017 have reached 32.15 percent in Tunisia, 31.14 percent in Jordan, 35.16 percent in Egypt and 33.78 percent in Morocco

In **Egypt**, the large population growth has resulted in a large education system, with approximately 20 million students (which is expected to keep increasing with the growth in the population) enrolled in pre-tertiary education. Egypt's 2014 constitution has defined compulsory education as including levels 1 (basic) and 2 (secondary). Education outcomes with respect to access and enrolment have significantly improved following government efforts to expand accessibility, accordingly the enrolment rate of students in the first two levels of the education system has reached 97.45 and 85.49 percent respectively (ETF, 2018).

The education infrastructure is having difficulty absorbing this increasing number of entrants into the education system. The regional distribution of the more affordable public schools in addition to the low quality of education provision at these schools creates difficulties for educational attainment and therefore could result in labour market entrants of lower quality. Egypt has witnessed a significant improvement in the access to education for both males and females. Despite that, the return on investment in education remains low. The main challenge when it comes to education in Egypt is no longer access to education, it is the quality of education and the consequential mismatch between educational results and the labour market's demands. The outdated curricula is considered one of the main reasons for the low quality of education.

The situation in **Tunisia** is not very different to the one in Egypt. The reforms of the Tunisian education system appear to meet the quantitative targets set by the government (Sultana, 2004).<sup>18</sup> The overall illiteracy rate in Tunisia decreased from 31.7 percent to 19 percent between 1994 and 2015, indicating an improvement in literacy over time.<sup>19</sup>

Tunisia is currently facing a number of challenges with regards to its education system. One of the greatest challenges is the quality of education and the disconnection between educational results and the labour market's needs. The 1991 reform introduced basic education and has led to the gradual abandonment of technical and vocational secondary education.<sup>20</sup> School dropout is another crucial problem facing the education system in Tunisia.

Educational attainment, especially at the higher/tertiary levels, have significantly increased over time in **Morocco**. The number of students at public universities tripled between 2005–2006 and 2018–2019. This is in addition to an annual increase of 13 percent in the number of university graduates between the same time periods.

The distribution of university graduates by the field of study highlights a quasi-dominance of studies with a legal, economic and social vocational bias.<sup>21</sup> The fields of technology, technical sciences and engineering represent less popular choices among Moroccan students.

In addition to the students enrolled in and graduated from public universities, a modest number of students are enrolled in private institutions. The private higher education of health sciences has grown in significance. Additionally, the number of graduates in the “business and management” and “science and technology” disciplinary fields has witnessed an increase. Despite this strong growth in the health sciences, the field of business and management continues to be attractive.

Similar to the situation in most of the non-oil MENA countries, school enrolment in Jordan is universal for males and females. The young Jordanian population is generally highly educated. This achievement has mainly been down to the education reform programs (Education Reform for the Knowledge Economy programs) as well as the ongoing efforts to improve the educational system. Despite these reforms and improvements, the Jordanian education system still faces major challenges with regards to providing education for all children in Jordan as well as improving the quality of education.

### The Jordanian education system and Syrian refugees

*The Jordanian Labour Market Panel Survey shows that between 2010 and 2016 the average level of education in Jordan declined, but this was mainly been attributed to the large influx of less educated Syrian refugees. There is less access to education for Syrians than for Jordanians at all levels of education, with Syrian girls being the most disadvantaged. However, the Government of Jordan has committed to increasing the access of Syrian refugees to education through the National Education Plan of Jordan.*

18 99 % of children aged 6 years, 97.2% of those aged 6 to 11 years, and 67.7% of those aged 12 to 18 years were in formal education.

19 Ministry of Development, Investment and International Cooperation, 2016.

20 The proportion of vocational students in secondary education is very low and declined from 13.9% in 2011 to 9.1% in 2016.

21 In fact, almost 6 out of 10 graduates from Moroccan universities have studied legal, economic and social sciences, literary culture and humanities, 15.2% in general sciences, these are open access fields that attract more students.

## i. Policies

Realising the significance of investing in education and continuously updating and upgrading the quality of education and enrolment of students, the MENA countries listed have prioritised education in their national plans. Either by modifying their constitution, drafting laws and regulations, or adopting a nationwide strategy, the MENA countries have identified pressing issues in their education systems and have devised plans to address them. An overview of the education infrastructure and environment in each country is contained in **Annexe 2** to this study. The amendment of the provisions (of Articles 28 and 29) of the Education Act under the new constitution of 2014 is considered one of the initiatives that greatly impacted Egypt's educational policy plan. The constitution states that education is compulsory until the completion of secondary stage or its equivalent. It also specified that 4 percent and 2 percent (with an annual increase to match global levels) of the gross national product shall be allocated to school and university education respectively. Understanding the significance of technical education in the Egyptian education system has been addressed through a separate approach.

### Transforming the Egyptian education strategy

The Ministry of Technical Education and Vocational Training was established in 2014 and merged with the Ministry of Education in 2015. The Ministry has adopted three main reform and improvement policies: providing equal opportunities for the entire school-age population to enrol or complete secondary education, improving the quality of the education services and strengthening institutional structure.

The Ministry's main strategy focuses on

1. Providing universal access to education and improving the quality of education to meet global standards.
2. Developing the students' and teachers' ability to learn, think and innovate.
3. Matching the payment scheme of the teachers with their qualifications to improve their living conditions. Improving the quality of education through skill development training programmes to increase the abilities of teachers.
4. Enhancing the education system with the necessary technology to improve the effectiveness and relevance of education. Digitalising the learning material and improving its accessibility for students, teachers and parents.

The main reform policies focus on equal opportunities for educational attainment and on addressing the infrastructural inclusion of poorer areas as a priority to facilitate the access of their residents to education. Improving the quality of education is another area of focus for education policymaking in Egypt. This is achieved by improving the curricula, providing efficient employee technology, effective leadership in schools and opportunities for professional and internal development of the teachers. Finally, and particularly with respect to addressing technical education, strengthening the structure of technical schools and building the capacity of education personnel to decentralise governance are the main priorities of the Egyptian Government. Other important developments in the Egyptian educational system include the establishment of science, technology, engineering and mathematics (STEM) schools in 2011, focusing primarily on the talent and excellence of the students, improving the number of community education schools and establishing schools for homeless children.<sup>22</sup>

**Tunisia** has also included education in its national priorities, investing substantially to universalise education across the country and for all social classes.

### Education policy reforms in Tunisia

Before 2011

In 2002, Tunisia launched its latest educational reform programme enabling Tunisian schools to meet the newly listed requirements and correcting the cumulative dysfunctions that had affected education performance. The Education Act of July 2002 declared that education was an absolute national priority, free and compulsory from ages 6 to 16 and is a fundamental right guaranteed to all Tunisians without discrimination.

After 2011

Tunisia has devoted an exceptional budget to education. Public spending on education has always been maintained at high levels, with an increasing percentage of public expenditure (Abdessalem 2010). The new constitution (2014) reaffirmed the importance of education through its Article 39, which continues to provide free public education up to the age of sixteen years.

<sup>22</sup> 34 schools were established serving 3,299 students.

After 2011, the Tunisian authorities introduced a series of reforms to improve the quality of education, strengthen vocational training, and reduce mismatch in the labour market.

Two strategic reform plans were launched. The first is the strategic plan for the education sector 2015–2020, aiming to reduce the dropout rate while improving quality standards through improved teacher training, upgraded curricula and infrastructure, and an enhanced framework for private sector partnerships (ETF, 2018). The second is the strategic plan for reform of higher education and scientific research 2015–2025 setting out five main objectives<sup>23</sup> of improving the quality of university education and the employability of graduates, promoting research and innovation, promoting good governance and optimising resource management, revising the university map for improved regional anchoring and balance, and promoting the pedagogical training of teachers.

### Morocco's strategic vision for education

The promotion of the vision depends on the interaction and complementarity with economic, cultural and political sectors as well as the administration and justice.

The strategy stresses the possibility of alternating languages as an educational tool, allowing a bilingual or plurilingual education.

The pillars of the Moroccan strategy focus on:

1. Quality in education
2. Promotion of training and scientific research system
3. Overcoming malfunctions
4. Upgrading infrastructure and equipment, incorporating new features

**Morocco** has embarked on implementing a strategic vision for education (2015–2030) mainly focusing on universal provision of all levels and systems of education. This vision focuses on equity through providing the necessary infrastructure that guarantees universal access, setting up educational and psychosocial support systems for the benefit of learners and certifying all levels of education and training.

**Jordan** has also devoted special attention to its education system. This emphasis arises from the national concern with continuously improving and upgrading the educational system. This is in addition to the commitment to catering for the education of the children and adolescents of Syrian refugees. A number of poli-

cies were therefore implemented with the aim of improving quality and access to education for all those who need it. The main policy direction for Jordan has focused on early years education, basic and secondary education, ensuring access to education for refugees, and improving the overall quality of education.

### Early childhood development in Jordan

The government has worked on improving the quality of the early years education through school facilities, curriculum, support and supervision for teachers and pupils and improving teachers' qualifications and professional development. A pre-service teacher education programme is in place for teachers hired for early years education to ensure a supply of qualified teachers. Other initiatives were put in place to improve the quality of early education: encouraging the participation of parents in their children's education as well as the employment of technology and enriching educational software, developing a project that raises the readiness of children to learn, improving learning materials and preparing teachers to provide effective instruction. Further improvements are still needed for this early stage of education. These improvements can be summed as: curricula modernisation, monitoring, evaluation and accountability as well as teachers ongoing development for the continuous upgrading of their skills.

The system of basic and secondary education in Jordan is an area of continuous improvement and development. School enrolment rates among Jordanians are high especially when compared to the rates among non-nationals. Jordan's increasing population and the addition of refugees has led to overcrowding in some schools, increasing the number of schools operating on double shifts, increasing the pressure on the infrastructure, fewer hours spent teaching and therefore a decline in the quality of education.<sup>24</sup>

Syrian students in Jordan are the main users of evening shifts in the double-school shift system. Accordingly, and with the

start of the Syrian crisis, the Ministry of Education in Jordan has worked on classifying Syrian students into three main groups to be able to identify the number of schools and classrooms needed along with their geographical distribution. This main challenges facing this plan are financial allocation and land availability.

A number of other challenges affect the education system in Jordan, including access and quality aspects, the inclusivity of education and the integration of Syrians. Jordan's increasing population and the increasing number of refugees have led to pressures on the infrastructure. The Government of Jordan has been working hard to address this infrastructure challenge to ensure inclusive education.

<sup>23</sup> Ministry of Higher Education and Scientific Research, Strategic Plan for the Reform of Higher Education and Scientific Research 2015–2025.

<sup>24</sup> This decrease in the quality resulting from double school shifts affect Syrian refugees more than it does Jordanians, with less than 20% of Jordanian students attending these schools, as opposed to the majority of Syrian students.

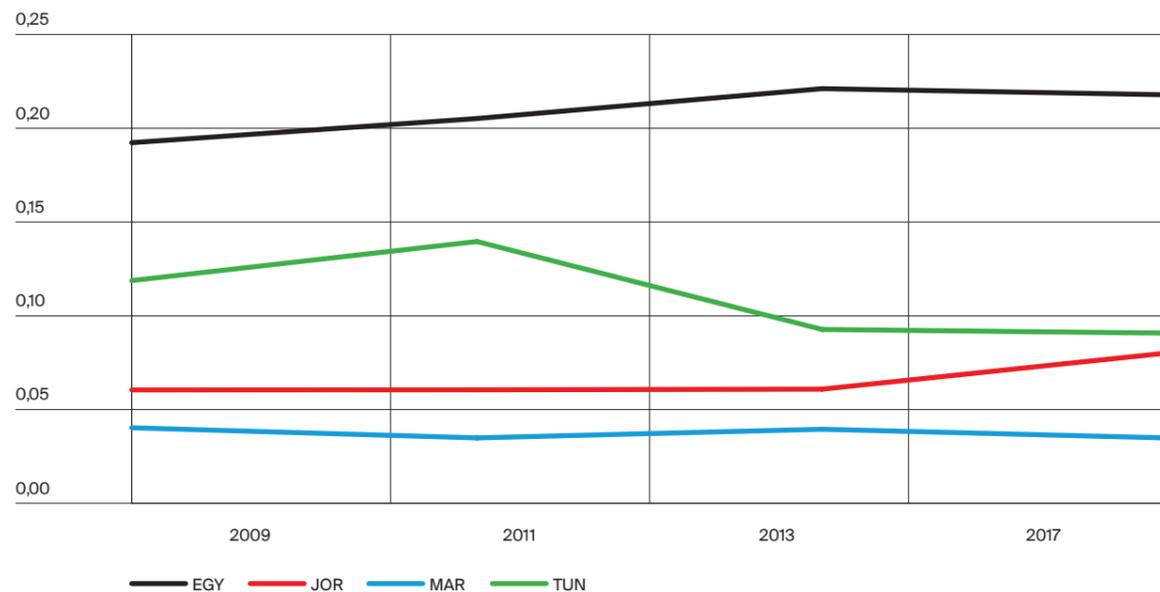
Other challenges facing the inclusivity of education in Jordan are cultural beliefs, poverty, early marriages for girls as well as child labour for boys, all of which have substantially restricted the education of Syrian children. This has required the Jordanian Government to collaborate with other international communities to improve education provisions for Syrian children. Another key challenge that arises with the integration of Syrian students in the education system is the disruption of education that a number of students went through as well as the trauma and the grief suffered by a number of them. Teachers have to be trained enough to be able to deal with these students. Some teachers in Jordan have already been had specialised psychosocial training while many others have not participated. The Ministry of Education offers both non-formal and informal education for Syrian refugee children and adolescents whose education has been disrupted by the conflict and who have not yet entered the formal system.

## ii. Technical and vocational education and training

Technical and vocational education (TVET) is producing skilled workers who are more adaptable to the changing labour markets. This educational path is considered a less prestigious second-class path of education that is undervalued by the population. This societal downgrading originated from the labour market paths of the TVET graduates. The kind of jobs that employ TVET graduates are usually low paying and less prestigious jobs. TVET is perceived as not providing adequate preparation for employment in the public sector or in a first-class private sector position.

The TVET education system is still considered limited in terms of the proportion of students compared with all secondary level students. TVET education varies in its importance from one country to another. Looking at the proportion of students in vocational education of all the students in secondary education, Egypt has the highest proportion of students, however it still accounts for a little less than one quarter of all secondary students. Tunisia comes next with TVET education being less attractive compared to Egypt. However, in addition to this limited attractiveness overall, it displays a pattern showing that proportional enrolment dropped in 2013 and continued at a low level of less than 10 percent. Morocco displays an opposite trend where, starting in 2013, proportional enrolment in technical education has increased. Jordan displays a somewhat stable trend in terms of proportional enrolment in technical education, recording rates less than 5 percent. Figure 7 below shows the proportion of vocational students compared with total secondary students in each country.

Figure 7: The proportion of vocational students compared with total secondary students in each country



Source: Author's own calculations using World Bank data, 2018

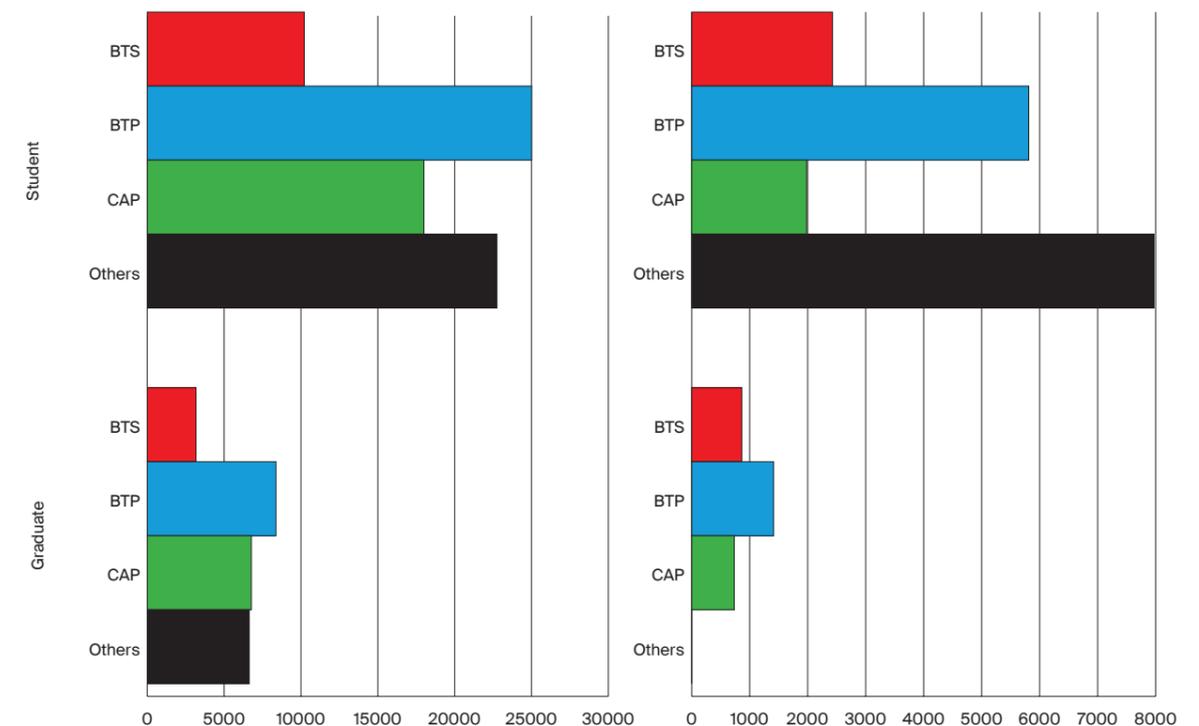
## 1. Provision

Despite its limited role in taking on a significant number of secondary education students (less than a quarter), TVET remains a major contributor to the **Egyptian** education system. There are around 1,600 technical schools in Egypt affiliated to the Ministry of Education, with approximate student enrolment of 2 million students across the country. In addition to these schools, there are 230 vocational training centres across Egypt where thousands of students are enrolled on technical courses.

Training is provided by both the public and private sectors. On the one hand, public sector training is very fragmented due to the existence of programmes and facilities across the different ministries. The Ministry of Education and Technical Education is the major player in charge of the administration of TVET school provision. There also exist middle technical schools providing two-year post-secondary courses in various institutes. Little is known about training in the private sector.

Vocational education and training (VET) in **Tunisia** comes under the responsibility of the Ministry of Vocational Training and Employment (MFPE) via the Tunisian Agency for Vocational Training (ATFP).<sup>25</sup> In 2016, the public sector had 196 vocational training centres (214 in 2011), of which 136 centres are managed by the ATFP. The remaining 60 public centres fall under the responsibility of three different ministries and one national office.<sup>26</sup>

Figure 8: Number of students and graduates in initial training by programme and sector, 2016



In **Morocco**, the vocational training offered is shared between the Office of Professional Training and Work Promotion (OFPPT), the private sector and other public operators. The OFPPT dominates the provision of technical education in Morocco, providing training to nearly 72 percent of the students. Private sector training has experienced a relative progression compared to 2016, offering training to 24.3 percent of the students. The public sector's contribution is limited to around 4 percent.

<sup>25</sup> The ATFP (Agence Tunisienne de la Formation Professionnelle) is a non-administrative public institution established in 1993 under 93-11 Act of 17 February 1993.

<sup>26</sup> These institutions include the Ministry of Defense, the Ministry of Agriculture, the National Office of Tunisian Tourism and the Ministry of Health.

Vocational education and training is not a very popular education path among **Jordanians**. The low participation is attributed to the already low enrolment in education at secondary stage, but more importantly the limited recognition of vocational education among young people in Jordan. This limited prominence has resulted from the weakness of the quality of the Jordanian TVET establishment. Growing interest among the Jordanian youth in entrepreneurial activities in the field of personal care, computers, communications and trade has dictated a demand for academic rather than vocational education. Despite these limitation and the efforts to direct the attention of young people to technical education and training, the Jordanian economy has invested a lot of effort in the infrastructure of TVET education.

The technical and vocational education and training system in Jordan consists of three main public segments across seven main specialisations. Community colleges, upper vocational secondary education as well as both formal and non-formal vocational training form the vocational infrastructure in Jordan. The non-public aspect is represented by private community colleges and NGOs as well as enterprise-based training.<sup>27</sup>The seven main specializations in the vocational education system in Jordan consist of information technology, health, Shari'a law, agriculture, manufacturing, hospitality and home economics.

## 2. Challenges

The provision of technical and vocational training and education in all four countries has been restricted by a number of challenges. These challenges can be summed up as infrastructure challenges, centralisation, lack of coordination and policy fragmentation.

The fragmentation of public sector training in **Egypt** and its spread across the ministries is a barrier to the success of these institutes and centres. The lack of coordination between the different entities involved has been the main reason behind the outdated curricula and the mismatch between the qualifications of graduates and the needs of the industrial sector.

Further challenges exist with regards to the large degree of fragmentation of the TVET system. The low quality of training of trainees/teachers is considered the main challenge facing vocational education in Egypt. The tutors at these technical and vocational institutions lacking quality training themselves.

The low social image and prestige stereotyping vocational education in Egypt has led to its decreased appeal among young people. The student tracking system that allocates students with lower preparatory school grades to TVET as opposed to general secondary education has increased this negative social image associated with TVET. As a result of this lack of interest, general awareness of the different specialisations offered within these TVET institutions is very low.

This lack of coordination has been very evident in **Jordan**, where the public sector's provision of technical and vocational training and education consists of four segments, pursuing their own policy priorities and causing a great deal of duplication, incompatibility and centralisation of decision making. This centralisation of decision making has included the purchase of equipment and changing any teaching content. Vocational education faces a number of different challenges, among which are inadequate facilities, outdated equipment, inadequately applied training and hands-on practice and little involvement, if any, of the private sector.

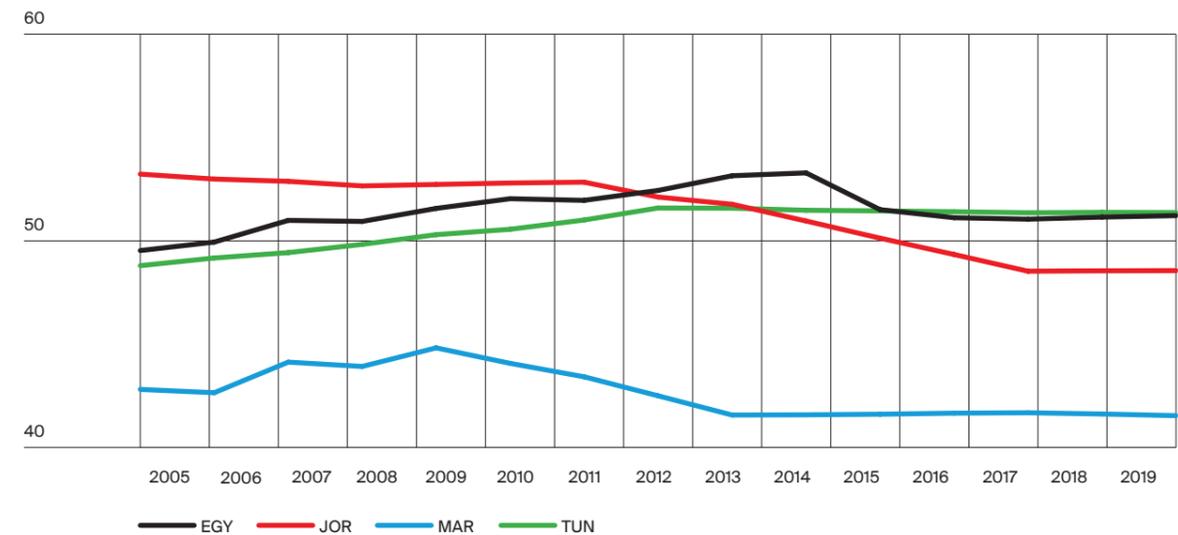
No evidence of consistent monitoring and evaluation of the effects of these programmes in any of the countries observed has been found. The services provided are mainly supply driven with minimal coordination with the needs of the labour market. This lack of follow-up and the minimal to non-existent coordination between the supply of training and the needs of the labour market have led to the deficiency of vocational and technical education and training in terms of labour market outcomes.

<sup>27</sup> In total, vocational education and training infrastructure is formed of 190 secondary schools, 50 training centres and 45 community colleges with seven main specialisations

## D Labour market trends

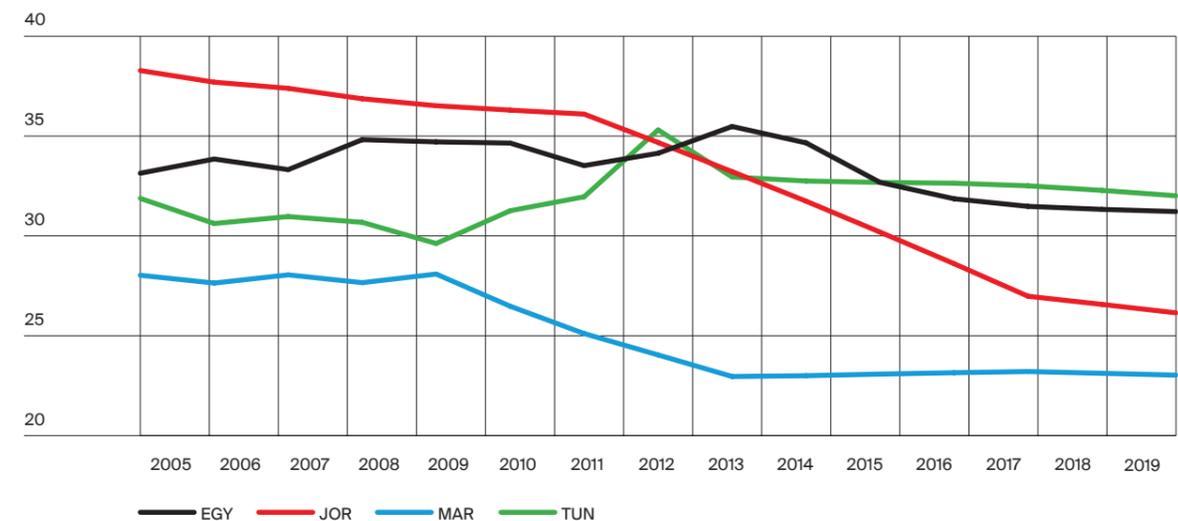
This demographic structure of the MENA countries and the increased working age population has posed challenges for the labour markets in these countries. Labour market participation rates across the four countries has ranged from 39 percent for Jordan to 48 percent for Egypt. Figures 9 and 10 below show the labour force participation rate among the working age population (15–64 years) and the labour force participation rate among the young population (15–24 years) respectively.

Figure 9: Labour force participation among the working age population (15–64)



Source: Author's own calculations using World Bank data, 2018

Figure 10: Labour force participation rate among the young population (15–24)



Source: Author's own calculations using World Bank data, 2018

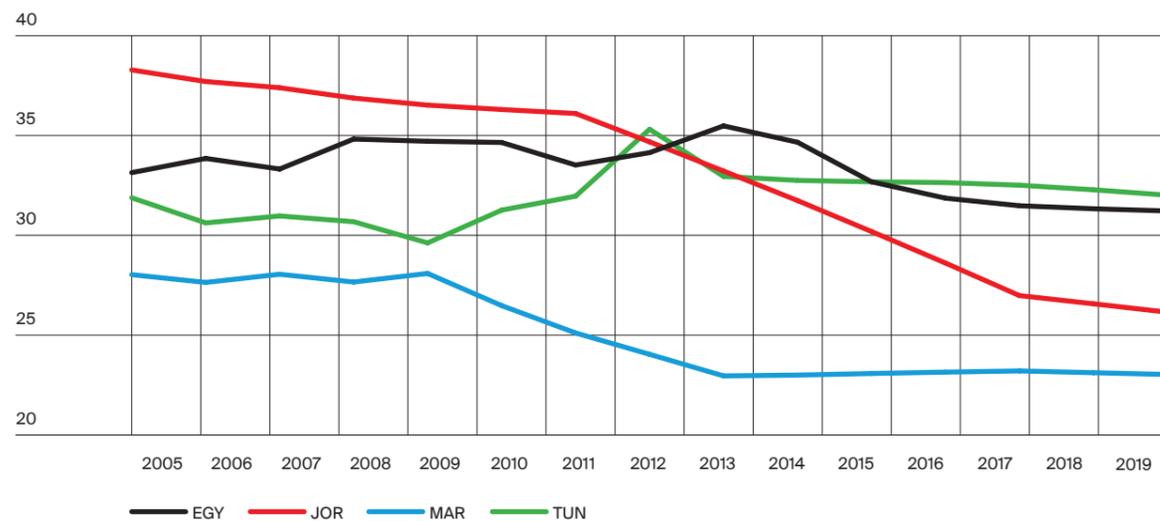
The figures above highlight common trends and findings among the labour force in the MENA countries. The political and economic instability in the years 2011 and 2012 have had minimal initial effect on the economic participation of the working age population. Jordan, however, is experiencing a different trend compared to the other countries. A continuous decline in labour force participation among the working age population, and among the young population started in 2009. This trend of declining economic participation continued until 2013, when participation rates stabilised at low levels.

A number of factors combined to give rise to this trend in labour force participation in the countries of the MENA region in general, and in Jordan specifically. The changes over time in the demographic composition of the different countries was mirrored in the size of the working age population as well as labour force participation as a primary outcome for the labour market. As discussed earlier, the size of the working age population (representing the quantity of supply of labour) together with the human capital investment (reflecting the quality of labour supply) both contribute to the trend observed in labour force participation across the four countries. This situation has given rise to labour market trends more commonly seen across the younger group of the population distribution. Unemployment, informality and migration have appeared as consequences of the supply-side factors of the labour market. However, the supply-side factors on their own do not play a major role. It is the inability to match the demand and the supply sides of the labour market, from both a supply and demand perspective, that lead to the consequential labour market outcomes.

### i. Labour force growth

The turbulent population growth rates for countries of the MENA region have been reflected in the growth rates in the labour force. Figure 11 below shows the growth rates in the labour force in the MENA countries. For most of their recent history, the labour force has always grown at rates faster than the growth in the population, with few exceptions when economic and demographic shocks reflect other trends. If the demand side of the labour market has not been adjusted to absorb and integrate the growing labour force, the result will always be undesirable outcomes in the labour market.

Figure 11: Labour force growth rate



Source: Author's own calculations using World Bank data, 2018

Figure 11 above highlights common increases or decreases in the growth of the labour force, with more unique trends taking place at other times. Egypt and Jordan experienced a sharp slowdown in the growth of the population in 2008 driven by the global financial crisis. Egypt and Tunisia experienced another drop in labour force growth in 2011 with the start of the revolution. Jordan witnessed a sharp increase in its labour force with the large influx of the Syrian refugees arriving at Jordan at the start of the Syrian crisis, expanding the population

base. The changing pattern in labour force growth is largely driven by demographic changes (fertility rates), the stage of demographic transition and the level of discouragement among the population and therefore entering and exiting the labour force as per the general state of the market.

The public sector has been the major source of employment in most of the MENA countries. The government and the public sector still act as the main employers of the labour force, although in other countries the capacity of the public sector to create more jobs has decreased or disappeared altogether. This limited role of the public sector has paved the way for the private informal sector, with the limited capacity of the private formal sector to absorb the growing labour force, especially at times of political and economic uncertainty spreading across the MENA countries.

Microenterprises and entrepreneurship have therefore appeared as the main contributors to formal employment and job creation. Therefore, the private sector in the MENA countries is composed of microenterprises to a large extent. Despite creating most of the jobs in most of the MENA countries, the small size of the enterprises has limited their capacity to absorb the increasing labour force.

This setup has created a situation in the MENA labour markets in which the highly educated and skilled job seekers resort to informal employment in the private formal or informal sector, exit the labour market or leave their countries to go to one where there are job opportunities.

The working age population in **Egypt** is growing at a high rate of at least 1.5 million people (3.1 percent) per year. The labour force is growing at a slightly lower rate of almost 1.8 per cent annually, corresponding to over 450 000 additional people in the labour supply per year. Looking at the employment rate, it was growing at an even lower rate of 0.9 percent with a growth rate in unemployment of approximately 11 percent. Total employment in Egypt has therefore grown by a total of 1 million workers between the years 2010 and 2015.

The International Labour Organization (ILO) has indicated that the agriculture and fisheries sectors have mostly been absorbing around a quarter of the Egyptian labour force. In 2006/07, nearly 27 percent of the labour force was absorbed into this sector. In more recent years (2017/18), the percentage of employees in the agricultural sector has fallen just below the 20 percent of the total employed workers.

The growth in employment in the Egyptian labour market therefore is mainly attributed to the rise in job creation in the construction and services sectors that were able to cover and make up for the decline that took place in the agriculture and industry sectors.<sup>28</sup> Similarly, the public and government sectors absorb approximately another quarter. During the same year, the manufacturing sector employed only 13.2 percent of total workers. The 2017 labour force survey shows that the representation of the individuals involved in household employment activities has risen from approximately 1 percent to just below 5 percent. No other significant changes in the composition of employment has been detected during the same period.

#### Females in the Tunisian labor force

According to Tunisian labor market surveys, strong inequality exists between males (74.1%) and females (26%). Women aged 25–34 years are the most likely to participate in the labor force. The FLFP tends to decrease with the age cohort, reaching 21.29% at the 45–54 years age cohort and 11.87% at the oldest age cohort (55–64 years). Women with higher education (university level) are more likely to participate in the labor market, unlike the uneducated ones who have a much lower rate of participation rate. Women from the Center West, the poorest region of the country, are less motivated to participate in the labor market.

Mining and electricity showed a sharper decline in job creation compared with the more limited drop in manufacturing. However, given the size of the subsectors, this moderate decline in the employment rate in the manufacturing sector was reflected in a sharp decline in the number of people employed, given the relatively large size of the sector.

In comparison, the working age population in **Tunisia** grew from 8.15 million in 2011 to 8.86 million in 2019.<sup>29</sup> The market labour force has shifted from 3.84 million to 4.16 million for the same period, which is equivalent to a growth rate of 1.0% per annum (compared with 1.05% for the working age population).

Looking at the **Jordanian** population, approximately 25 percent are non-national citizens. Among the remaining 75 percent of Jordanians, approximately half are of working age, with less than half of those being economically active. Approximately half a million Jordanians, mainly the highly educated, are working in the Gulf countries. In

<sup>28</sup> This decline in job creation in the agriculture and industry sector did not uniformly affect all the subsectors.

<sup>29</sup> According to the National Institute of Statistics, the working age population is defined as those aged 15 and older. The working age population (15–64) grew from 7.45 million in 2007 to 7.83 in 2017.

general, the Jordanian labour force is growing at 4 percent per annum. According to Jordanian Government officials, it is expected that within a decade, 25 percent of Jordanian citizens will reach working age. The continuous entrance of newcomers to the Jordanian labour market and the repeated concern with the economic growth and the social stability of the country mean that the creation of additional jobs for young jobseekers is a priority.

With self-employment appearing as an alternative absorbent of the labour force, another challenge is created for the Jordanian labour force. The negative stigma attached to technical and vocation education and training is reflected in self-employment and in certain jobs, including jobs in the services sector and jobs involving physical labour, such as construction work. These jobs are seen as lowering social status and jeopardising long-term career options<sup>30</sup> and therefore are avoided by many of Jordanian young people.

The **Moroccan** labour market was marked by the increase in the working age population (aged 15 years and over) and the continuing decline in activity and employment rates between 2005 and 2019. According to the National Employment Survey of the Higher Planning Commission, in 2019, the working age population (15 years and over) reached 26,236,000 people. In 2018, the working age population reached 25 million people, of which only 12 million are active.

The drop in the participation rates in the Moroccan labour market was primarily attributable to the continuing decline in the participation of young people and women in the labour market. The low integration of women into the labour market can be seen in the nature of their activity, characterised by domestic work and unpaid work as family help, especially in the agricultural sector. Almost all domestic work is carried out by women (92%), while their share in the overall volume of professional work is just approaching 21%.

Middle-aged **Moroccans** form the majority of the active labour force. The young age group is affected by unemployment more than adults because they tend to have higher qualifications and are therefore discerning and look for jobs that match their skills.

## ii. Unemployment

Unemployment among the young educated generations is the main weakness of the MENA labour markets, reaching approximately 20–40 percent of the total unemployed in the different countries. Egypt, Tunisia, Morocco and Jordan, like most of the non-oil MENA countries, are experiencing high unemployment rates.

Young people represent approximately 80 percent of the unemployed in Egypt. <sup>31</sup>Tunisia suffers from high unemployment rates, rising from 12.4 percent in 2008 to 15.1 percent in 2019 among university graduates and most dramatically for young educated women (Haouas et al. 2012, World Bank 2014b, Assaad et al. 2016). Egypt and Tunisia have further experienced the return of a significant number of migrants from Libya, adding to the ailments of their local labour market and increasing the pool of unemployed.

**Jordan** is experiencing sharp increases in unemployment rates<sup>32</sup> from 15.3 percent in 2002 up to 19 percent in 2019. A drop in the unemployment rate was recorded between 2008 and 2014. This drop, however, was not a sign of improvement, it was however a sign of increased inactivity, when labour force participation at the time dropped from 37 percent in 2013 to 36 percent in 2014.

A common feature of the Jordanian labour market is the widespread economic inactivity among Jordanian youth, recording the lowest school to work transition in the region. Many young Jordanians can spend up to 3 years or more looking for a job. High labour market dropout rates are also recorded among Jordanian young people. Employees are only likely to remain in jobs that provide favourable conditions (good salaries, decent work conditions and growth opportunities). This high turnover adds to the burdens affecting business performance, further crippling the capacity to hire.

**Morocco** has been experiencing a slowdown in their already high unemployment rates. Unemployment fell from 11.1 percent in 2005 to 9.5 percent in 2018. High unemployment still persists among young people, with rates of 24.9 percent in the 15–24 age group, compared to 15.1 percent, 5 percent and 2.5 percent for the 25–34, 35–44 and 45 and above age groups respectively. Moreover, female unemployment in Morocco has witnessed a sharp increase starting in 2017, widening the gap between the unemployment rates for males and females,

30 An opposite trend has actually been the case in the Jordanian labour market, where employers prefer young people who have some kind of work experience, over those with periods of dropping out and inactivity.

31 The highest rates exist among the 15–24 age group.

32 The situation is a lot harsher for young women, for whom unemployment rates reached over 60 percent in 2019.

with a maximum difference of 6 percentage points in 2018. 2019 saw a slowdown in unemployment rates for both males and females, slightly reducing the gap to 5.7 percentage points. Despite the resurgent economic growth rates in the years following the revolution, job creation in **Egypt** was not able to keep up. Unemployment rates remained stubbornly high and did not respond to the fluctuations in the growth rates. That is why Egypt has witnessed a significant rise in unemployment rates, with a peak of 13 percent in 2013. Unemployment rates have since started to decline, reaching a national low of 10 percent in 2018. Youth unemployment (31 percent), however, remains a particular problem.

Looking at the reasons for these high unemployment rates, it can be seen that demand and supply measures contribute to these rates. On the supply side, the large population growth, the demographic dividend and the demographic dominance of the young population over the working population have already contributed to a large base of jobseekers. Egypt is experiencing a temporary slowdown in new entrants to the labour market due to a temporary slowdown in population growth. This slowdown has not managed to significantly reduce unemployment rates or the time taken for young and educated Egyptians to find work.

The plight of youth unemployment in Egypt has its roots in the high rates among the more financially able and educated as compared to the poor and less educated. Less educated and less financially able young people cannot afford to remain without a job due to the financial constraints they face, and will accept any kind of job they get. However, educated and the wealthier young people can afford to stay unemployed for longer while they waiting for a formal and a more stable job offer. That's why the problem of unemployment problem is more acute among educated young people of Egypt.

The demographic explanation manages to explain the high unemployment rates among young people. However, other reasons have worked together to explain the high rates among skilled segments of the population. The public sector has for a long time acted as the main employer in the MENA countries, especially for the educated. With the saturation of the public sector, the inflated public expenditure and wage bill and the decline in productivity in the public sector, its capacity to absorb has been significantly reduced. The private sector on the other hand is having difficulty coping with political, security and economic instabilities. Therefore, with businesses downsizing and leaving the market, not only was the hiring process affected, but also employed people have started losing their jobs which is adding to the pool of cyclically unemployed.

The slowdown or the shutdown that many private sector companies experienced in Egypt and Tunisia after 2011 <sup>33</sup>have altered the job creation scheme in both countries. The supply side in terms of youth unemployment in Egypt is complemented by a relatively low demand for skilled and educated labour with greater hiring of low skilled workers for low productivity jobs with depressed wages. Accordingly, high youth unemployment (according to the CAPMAS 2005 Labor Force Sample Survey, 92% of unemployed people are below the age of 30), high levels of informality, and low-quality jobs are the main adverse outcomes on the Egyptian labour market.

In **Jordan**, the inflated energy prices, increasing costs of production and creation of inflationary and recessionary pressures on the economy have driven the scarcity of job opportunities and the reluctance of employers to hire new graduates.

The supply and demand measures driving unemployment rates up are more affected by the integration among them. In this sense, frictional and structural unemployment are highly driven by the mismatch occurring on the MENA labour markets. This mismatch is represented by the private sector demonstrating needs that are not quite met by the pool of educated jobseekers. The skill composition and the quality of education has significantly contributed to unemployment among young and educated people. Unemployment in Egypt is largely structural unemployment, where the pool of unemployed are the new entrants into the labour market, with a few employed who have lost their jobs (ETF, 2014). Unemployment rates are increasing at every educational level. This has led to the unemployment rates among higher educated individuals (post-secondary and university levels) being significantly higher than the rates among low educated people. The mismatch is also highly pronounced in Jordan, where the main reasons identified for the structural unemployment is the mismatch in the skills produced by the education system and training systems and those demanded by the labour market/employers. This adds to the changing demographic structure of the Jordanian population as well as the poor information system about the needs and availability of job opportunities on the Jordanian labour market. Accordingly, the skill mismatch and the information mismatch are considered the main causes of the structural unemployment on the Jordanian labour market.

33 Tunisia suffered from a delocalisation of multinational companies to Morocco.

**Tunisia** has recently developed its higher education system to move up the value chain given its restricted growth beyond low-skill and low-wage activities. As a result, the newly unemployed have mainly been the young and well-educated, reflecting a structural mismatch between labour market demand for unskilled workers and an increasing supply of skilled labour (World Bank 2010).

### iii. Informal employment

The definition of informality presents a challenge for developing countries. The most widely used definition is that adopted in 1993 at the fifteenth International Conference of Labour Statisticians (ICLS, see ILO 1993a, b). According to the ICLS, the informal sector is defined, irrespective of the kind of workplace, by the extent of fixed capital assets, the duration of the activity of the enterprise, and its operation as a main or secondary activity (Charmes 2004). It comprises: *i*) informal self-owned enterprises which may employ family workers and employees on an occasional basis<sup>34</sup>, *ii*) enterprises of informal employers which may employ one or more employees on a continuous basis and which comply with one or both of the following criteria:

- Size of the establishment must be below a specified level of employment<sup>35</sup>
- Non-registration of the enterprise or its employees.

The conditions on the MENA labour markets have contributed to the expansion of the informal economy. This informal economy includes informal enterprises as well as informal workers. What is of more concern to this report is informal employment. Informally employed workers, with no access to either social security or formal contracts, are the most disadvantaged employees in the labour force.

The expansion of informality is having its impact on the quality of life and living standards of the individuals themselves, but also at macroeconomic level. With the inflated unemployment and inactivity rates among the new young entrants into the labour market, in addition to the degree of informality of jobs taking on a great proportion of the employed among them, the contribution to the social security and the pension schemes by formal employment is rather limited. This could add to the burden of public expenditure affecting the overall macroeconomic indicators of the countries.

In the case of MENA countries, as elsewhere, unemployment is a strong driver for informality. Unemployment has hit educated people who can better afford to wait until a “good job” is secured, while informality has been the only alternative to those who cannot afford the wait with no access to income sources.

In **Egypt**, the informal economy absorbs between 50 and 70 percent of employment (ETF, 2018). Assaad (2018) argues that the structural change in the Egyptian economy and the shift away from the agricultural sector is the main reason contributing to the spread of informality, consisting mainly of small firms, among the new entrants to the Egyptian labour market. It was once the role of the agricultural sector to absorb the new entrants to the labour market, however, this role is now being assumed by the informal sector, consisting mainly of small firms (Assaad, 2018)

The **Tunisian** economy is also suffering from the explosive growth of the informal sector. According to the IMF's report, the informal economy represented 30% of Tunisia's GDP in 2010.<sup>36</sup> In 2015, there were 1,092,000 workers in the informal sector, representing 32.2 percent of the employed population.<sup>37</sup>

The case in Jordan is different, not with respect to the size of its informal economy, but the characteristics of the informal economy. The informal sector is a sizeable sector representing approximately 20 percent of GDP, however with minimal representation of Jordanians. The majority of the workers in the informal sector are foreigners, mainly from Egypt.

**Morocco** is facing the same conditions, with approximately 36 percent of non-agricultural employees being informally employed (Higher Planning Commission). The growth in the informal sector in Morocco is estimated to be approximately 150,000 jobs annually, representing almost a third of all job creation in Morocco.

34 This segment comprises either all self-owned enterprises, or only those which are not registered under specific forms of national legislation (factories or commercial acts, tax or social security laws, professional groups, regulatory or similar acts, laws or regulations established by national legislative bodies).

35 It was about 5 employees for Panama, 6 for Brazil and Tunisia, 10 for the United Republic of Tanzania, Turkey and India, and 11 for Ethiopia and Mali.

36 Report by the International Monetary Fund about the informal economy in Tunisia (2010).

37 Social Protection and the Informal Economy in Tunisia: Challenges of Transition to the Formal Economy in Tunisia, prepared by the Centre for Research and Social Studies (CRES) and the African Development Bank (AfDB).

The lack of official, quantifiable and nationwide measures for informality complicates the policy-making process that aims to bring it under control. The four MENA countries selected depend on non-official but representative labour force surveys by independent research institutions attempting to understand the size and characteristics of the informal sector. The main conclusion that is very common among the non-oil producing MENA countries is the expansion in the size of the informal economy and the wide representation of the middle- and low-skilled workers in that sector. In addition, there is the limited role of informal employment in attracting highly skilled unemployed individuals, or women, given the social stigma.

Looking at household surveys, characteristics of informal employees are analysed at a country level and, when possible, compared over time and across countries. In **Egypt**, the Egyptian Labour Market Panel Survey shows that the informal sector is absorbing the younger generation and increases as one moves towards the rural sectors in Egypt. The spread of the informal sector in rural Egypt is mainly resulting from the limited access to finance and social networks compounded by the high levels of poverty. This is confirmed by the spread of informality across the poorest wealth quintiles. In this context, males with higher levels of education have the lowest chances of informal employment, and if informally employed, they tend to remain in this situation for a short time period before switching to semi-formal or formal employment.

The **Jordanian** Labour Force Panel Survey confirms that informality is more concentrated among the foreign workers.<sup>38</sup> While data is largely non-existent regarding informal employment, it is quite interpretable given the number of Syrian refugees who have not been granted work permits since the beginning of the crisis in 2012 and until the end of 2016. These low-skilled refugees have expressed great willingness to work for less money and under less than acceptable working conditions. This has pushed wages for the low skilled down, mainly in the informal sector, highly affecting the working poor and pushing them further into poverty. This perpetuates a vicious cycle of low skill-low wage-low productivity that is very much present in the Jordanian economy.

The **Tunisian** Labour Market Panel Survey (TLMPS) reveals that while 74 percent of the employed workers represented in the survey are wage workers, 16 percent and 5 percent are self-employed or employers respectively. Furthermore, over 37 percent of the jobs were generated by microenterprises, while the contribution of large enterprises in employment represents only 15 percent of the jobs generated. An additional variable that aims to identify informal employment is the contractual agreement. TLMPS shows that a large proportion of employees (39 percent) are working without a contract.

Data sources in **Morocco** allow for deeper understanding of informal employment. The trade sector is considered to be the sector employing almost half of the informal employees in Morocco. The remaining informal employment is highly concentrated in services, industry and construction.

Employment in the informal sector is more concentrated in urban areas, with a rate of 72.9 percent, compared to 27 percent in rural areas. Administrative divisions, urbanisation and urban expansion in Morocco have contributed to the drop of 1 percentage point in informal employment in rural areas. Self-employment dominates informal employment in Morocco, with 68 percent of permanent workers in the informal sector being self-employed and 10.9 percent being employers. These two categories alone constitute the vast majority (78.9 percent) of all permanent informal workers.

### iv. Labour market demand by profession and economic sector

Research regarding demand in the MENA region is narrow given the limited data availability regarding demand in the labour market. The fragmentation of the MENA labour markets, and the lack of a solid database with data and information on job opportunities is restricting policymaking in the MENA countries, in particular interventions aiming to close the gap between demand and supply. Annexe 1 of this study provides a comprehensive account of data sources for labour market characteristics in the region on a country-by-country basis.

New entrants to the labour market either represent a reaction to existing labour demand in the formal and informal sector, or replacement demand (substituting for older outdated skills, retired, dead or migrants). Labour demand, however, has never been sufficient to absorb the increasing labour supply of the MENA countries. This weak labour demand has resulted in high unemployment, especially among the young new entrants to the labour market, as noted earlier. Furthermore, weak labour demand is associated with underemployment, as many graduates are compelled to seek occupations under their skill level or on a part-time basis.

38 Foreign workers are mainly engaged in retail construction and agriculture, sectors that have been identified by the Jordanian vision 2025 as the fastest growing sectors in the Jordanian economy.

Small-scale enterprises and economic activities create most of the demand for labour in the MENA labour markets. These enterprises create jobs at a faster rate than large enterprises. Given the size and the capacities of these small-scale enterprises, the job opportunities created are not enough to attract the entire pool of jobseekers who are either unemployed, or who have totally exited the labour market. Additionally, these small sectors are mainly low productivity service providers and are often part of the informal sector. A vicious cycle of restricted firm growth and crippled job creation has plagued the formal labour markets in the MENA countries.

In **Egypt**, the service sector has always made the major contribution to absorbing new entrants into employment, followed by agriculture, construction and industry (the latter being the least absorbent). The most relevant branches of the service sector for employment creation are wholesale and retail trade, public administration and health and transportation. Accordingly, the traditional sectors of the industrial and manufacturing economic sectors are the ones contributing to the increased levels of employment. The more modern sectors, however, such as IT, financial activities and professional positions, have been registering declining rates of growth in employment, or even negative employment altogether. Therefore it is this limited dynamism in the agriculture and manufacturing sectors and the limited performance in the modern service sector that characterise the overall limited demand in the labour market.

**Tunisia**, working on achieving growth in sectors beyond low-skill and low-wage activities, managed to create 100,000 jobs in 2018, with 13 percent of them being for managers. The manufacturing sector, on the other hand, accounts for more than half of all job vacancies for the same year.

Tunisia has been extracting labour demand data from ANETI by monitoring job vacancies, which only reports on vacancies as a proportion of the whole market demand. Firms, however, use other recruitment channels to identify the profiles of job applicants they are searching for (such as Adecco, Manpower, etc.). This diversity in the sources therefore fails to create comprehensive reporting on labour market data. Table 1 below summarises the data extracted for labour demand in Tunisia for the recent period of 2015–2018 using the ANETI data.

Table 1: Labour market demand by economic sector and qualification in Tunisia

| By economic sector             | 2015   | 2016   | 2017   | 2018    |
|--------------------------------|--------|--------|--------|---------|
| Agriculture and fishing        | 2,771  | 1,958  | 2,402  | 3,685   |
| Mine and Energy                | 698    | 436    | 465    | 756     |
| Manufacturing Industries       | 41,045 | 42,301 | 45,424 | 53,837  |
| Of which textiles and clothing | 13,501 | 15,325 | 17,718 | 21,852  |
| Construction                   | 2,366  | 2,484  | 2,200  | 2,938   |
| Services                       | 32,057 | 33,892 | 35,605 | 39,479  |
| Of which: Tourism              | 5,190  | 5,755  | 5,881  | 7,002   |
| Trade                          | 9,058  | 9,479  | 9,977  | 11,053  |
| Transport                      | 1,331  | 1,888  | 1,696  | 1,829   |
| Administrative services        | 2,876  | 3,485  | 4,006  | 4,166   |
| By qualification               |        |        |        |         |
| For managers                   | 9,837  | 10,605 | 9,772  | 13,212  |
| For non-managers               | 69,100 | 70,466 | 76,324 | 87,483  |
| Total                          | 78,937 | 81,071 | 86,096 | 100,695 |

Source: ANETI.

#### The informal sector and Syrian refugees in Jordan

*The influx of the low-skilled Syrian refugees have contributed to the informal sector. The ILO (2017) has estimated that approximately 50 percent and 99 percent of Jordanians and Syrians respectively, are working in the informal sector. The concerns with the informal sector have escalated with the Syrian crisis and the influx of Syrian refugees. The majority of Syrian refugees have either not completed basic education, or have just completed secondary education. This is in addition to the restricted work permits for the Syrian refugees issued by the Jordanian government. The Syrian refugees have increased the competition for lower skilled jobs, creating downward pressure on wages, and have also been crowding out Jordanians from the informal sector. The Syrians working in the informal sector in Jordan accept lower wages, working under harsh conditions of long working hours, no contract and with no social protection. These conditions are considered highly unacceptable by the Jordanians and therefore the Syrian refugees were able to push them aside and take their place.*

The **Jordanian** economy has experienced major upward and downward shocks in rates of economic growth. Even at times of high economic growth, Jordan has failed to generate jobs that match the number and qualifications of job seekers. The Jordanian economy is a service-dominated economy.<sup>39</sup> Over the recent history of Jordan, the share of employment in the services sector has increased significantly with a decline in the industry and a less severe decline in the agricultural sector (ILO, 2017).

Failing to account for and monitor current vacancies, the Jordanian government monitors labour demand through the major current employers. More specifically, public administration, defence and social security as well as transportation and storage, construction and

manufacturing have been the main sectors that have witnessed an increase in their share of employment.<sup>40</sup> Judging by the macroeconomic indicators, the renewable energy and pharmaceuticals sectors have been identified as potential growth sectors in the Jordanian economy. It is therefore expected that the growth of these sectors could start generating work opportunities and therefore generate increased demand, especially among the skilled and educated population, for Jordanians and those of foreign origin.

Dissecting sectors by gender, it can be observed that the health and social work sector as well as the education sector are still considered the main female employers in Jordan. For males, the transportation and storage, construction and manufacturing sectors are considered the main employers. Despite the strong representation of women in these sectors, a significant portion of males in employment could be seen in public administration, defence and social security.

**Morocco** presents a special case in the MENA countries, where the government is able to monitor future labour needs by companies. The Moroccan National Survey of Employment and the “prospective watch” survey carried out by the National Agency for the Promotion of Employment and Skills (ANAPEC) remains the main source that addresses the future employment needs of companies. These sources, although very important in identifying labour market needs, are not comprehensive enough to reflect nationwide labour demand.

Between 2005 and 2019, the national Moroccan economy created approximately 1.5 million additional jobs. Being a primarily agricultural society, and given a bad agricultural year<sup>41</sup> (2018/19), the volume of employment dropped in the rural sector, lowering the net national job creation that year, with more than half of it being in the service sector. Construction and public works, and industries, including handicrafts, are the next employers in the Moroccan economy, but to a much lesser extent. With the increase in job creation, the Moroccan labour force is becoming more masculine, urban and educated.

In terms of short-term employment needs, the results of the “prospective watch” survey show that the forecast labour demand is highly concentrated in Casablanca, Rabat and Tangier. The automotive sector accounts for 29 percent of the demand, followed by administrative and support service activities (17 percent).

<sup>39</sup> The service sector contributes over half of the GDP, as compared to industry which contributes approximately 30 percent of GDP.

<sup>40</sup> The greatest share of the increased employment in public administration, defence and security was among women.

<sup>41</sup> The “agricultural, forestry and fishing” sector lost 146,000 jobs.

The largely fluctuating economies and sluggish growth in the non-oil MENA countries have made it necessary to embark upon nationally driven and internationally devised economic reform plans. These reforms aim at improving macroeconomic indicators while mitigating their potential negative social impact. In terms of sector, it is the growth of the agricultural and service sectors that has been the engine of economic activity. This economic growth, however, has been highly influenced by the demographic changes occurring in these countries. These changes include the increasing proportion of the working age population, which is expected to lead to an increase in the output per capita having a positive impact on the economic growth of countries. However, this relationship is dependent on the effectiveness of policies dedicated to improving the economic participation and activity of this working age group. These policies should stimulate investment in human capital (both general and vocational education) while reaping the benefits of this investment through improving the employability of the working age population. In this context, unemployment and informal employment are considered to be the main challenges faced by young populations in these countries.

# III. Human capital, labour markets and mismatch

The previous sections highlighted the advancement and significant progress of the non-oil MENA countries in education attainment. It has nevertheless been highlighted that an improvement in human capital did not automatically translate into more job opportunities and the facilitation of labour market access. On the contrary, educated young people have been the segment the most affected by unemployment throughout the four countries. This chapter reviews in detail the drivers identified for this mismatch while examining government interventions designed to weaken them.

## A Skills mismatch

The previous description of education, employment and unemployment trends in the non-oil MENA countries has illustrated the ambiguous interplay at work. The fast growth in population, crippled job creation in the private sector and the frictional mismatch between demand and supply has resulted in the current situation of the non-oil MENA labour markets. This has fuelled a positive correlation between educational attainment and the level of unemployment and inactivity amongst young people. Overqualification and overeducation are simply the most salient effects of this mismatch.

The mismatch classifying the labour markets is categorised as a vertical and a horizontal mismatch. This classification shows that the level of education or skills acquired is higher than the one requested by the market and is not even of the right type. In other words, the education received does not correspond to market needs for many individuals. Very often, the education acquired creates certain expectations in terms of skills required and wages offered which are insufficiently met under the current conditions. The induced quantitative and qualitative mismatch results in unemployment and inactivity among the working age population. In order to understand this phenomenon, it is necessary to undertake an alternative, more qualitative, analysis of the labour markets, examining the gap between skills supplied and those demanded.

Assaad et. al (2018) has identified this prevailing situation in the MENA region as “the MENA paradox” where the population is highly educated, yet highly inactive and unemployed. This paradox reflects the human capital mismatch, in both quality and quantity of the labour force. It contributes to exacerbating the region’s informal employment problem and prevents it from harnessing full economic potential.

The human capital mismatch is present in all the non-oil MENA countries at different levels. **Egypt** has invested in achieving universal enrolment and attainment of education at all levels. Historically, university education has been the main path of the many young Egyptians, given the prospect of good quality formal job that awaits them upon graduation. However, the mismatch between the skills acquired through education and training, and those demanded by the labour market have resulted in high unemployment. This unemployment rate is worsened by the insufficient rate of job creation that would absorb the growing number of jobseekers. Discouragement is another outcome of this labour market mismatch. A recorded high of 27.6 percent of young people aged 15 to 24 are not in employment, education or training (NEET). This number goes up to 40.7 percent of young people aged 15 to 29 (World Bank).

The differentiated job quality and working conditions between the private and the public sectors have led to an increased preference for the public sector. Despite the prevalence of higher salaries in a small number of segments within the formal private sector, job security in the public sector and the guarantee of a pension remain very often the most compelling arguments. The Government of Egypt’s fiscal adjustments have led to reduced employment in the public sector and, together with limited job creation in the private sector, this has resulted in high levels of informality that further negatively affect economic efficiency and productivity.

Consequently, unemployment has been concentrated among the tertiary education graduates, where the young people with medium skills, more specifically technical skills, have seen better employability. This shows the partial incompatibility between the outcomes of education, including outdated curricula and insufficiently trained teachers, and the labour market’s expressed needs. This mismatch has forced almost half of working young people to engage in occupations that do not match their education and has led to an increasing skills gap, with employers reporting difficulties in finding the skilled labour needed (ETF, 2018).

Among the graduates of TVET education, the unemployment rates among post-secondary TVET graduates is high and is increasing with time (15.2 percent in 2006 and 16.6 percent in 2010). During the same time period, the number of graduates from post-secondary TVET education has decreased, with a recorded increase in the demand for their skills. This contradiction can be explained by the modest quality of these accumulated skills driving unemployment among those graduates. Surveys with post-secondary TVET graduates and employers exist on a small scale in Egypt. The findings of these surveys refer to the limited adaptability of the curricula to the labour market's needs, depending on the specialisation and the institution.

#### Labour market mismatch and Syrian refugees in Jordan

*Given the high reservation wages of the Jordanian youths, especially university graduates, migrants and refugees have been filling this gap in the market. They provide the Jordanian labour market with affordable, flexible and less demanding workers. Given their economic and social vulnerabilities, migrants and refugees are willing to work for long hours, under difficult conditions and for low pay. This has further aggravated the situation for Jordanian young people and made it more difficult to compete under these working conditions. However, with the evolving economic conditions and the unemployment pressures, Jordanians are now willing to take on jobs that they would not have considered in the past.*

The education system produces a large number of university graduates each year, however less than half of the new jobs created annually are suitable for university graduates and the remainder are suitable for workers with a high school education or lower, who are mainly migrant workers. This lack of suitable jobs for the highly educated, highly skilled young people in Egypt has resulted in many of them seeking employment abroad. This migration certainly eases many of the pressures on the Egyptian labour market, although could have long-term developmental consequences for Egypt.

In addition to demand-deficient unemployment, wages have also been reflecting labour market imbalances. Jobs recording the highest wage increases in Egypt are among “technicians and associate professionals, machine operators, service workers, market sales and clerical occupations” (ILO, 2017). This confirms the concentration of the demand among the medium-skilled and the technical workers and not the highly skilled professionals.

A deeper analysis further points to an acute mismatch in the search for public sector jobs. The scarcity in the public sector jobs, given the restructuring of the Egyptian economy away from state-led growth, is the main reason for frustrated ambitions among young educated people. Job creation in the formal private sector does not compensate for this limited availability of jobs lost in the public sector. However, private sector employment is characterised by prolonged working hours and less flexibility when compared to the public sector, and is therefore not favoured by young Egyptians. Entrepreneurship has appeared as the main economic activity addressing youth inactivity. However, the lack of access to finance acts as a further barrier to aspiring entrepreneurs.

The high unemployment rate and the limited availability of job opportunities for the educated young people of Egypt have resulted in aspirations to leave the country. Those aspiring to migrate are mainly looking to leave the country and work in GCC countries and knowledge economies where they can make use of their skills. Accordingly, it is estimated that approximately half a million (or more) highly skilled Egyptians are employed in the Gulf countries, mainly Saudi Arabia and the UAE.

The **Tunisian** economy is largely oriented towards low-skilled or unskilled economic activities. The employed population is mainly involved in activities with low added value (such as trade, transport and telecommunications, construction, textiles and clothing) requiring primary and/or secondary education profiles as a priority. The employment survey conducted by the Arab Institute of Business Managers (IACE)<sup>42</sup> confirms the most frequently low-skilled vacant jobs (blue-collar workers, commercial attachés). Furthermore, the Tunisian Centre for Economic Intelligence and Monitoring (CTVIE)<sup>43</sup> reports difficulties facing companies in hiring skilled workers (Labidi et al., 2017).

The Tunisian economy has not yet achieved the structural transformation that would enable it to absorb new entrants, especially higher education graduates. With approximately 60 percent of the new entrants to the labour market having a university degree, almost 30 percent remain unemployed. Among these unemployed graduates themselves, there is some degree of disparity in unemployment rates, pointing to the fact that some skills are more desired than others in the labour market. For example, senior technicians and hard science graduates, being the most affected by unemployment, accounted for nearly 60 percent of

42 IACE, Rapport sur l'emploi, 2016.

43 Operates under the supervision of the Arab Institute for Entrepreneurship (IACE).

unemployed graduates in 2011. In 2018, the number of unemployed senior technicians reached more than 68,000, with a lower proportion of unemployed higher education graduates reaching 26 percent in 2018.<sup>44</sup>

In **Morocco**, unemployment rates have been found to affect particular groups of the population more severely than others. It therefore needs to be noted that the highest unemployment rates are observed more in urban areas than rural ones, among women more than men, more in the younger (15–24) age group than the older and more amongst the educated than the uneducated. Vertical and horizontal mismatches are pronounced in the Moroccan labour market. Vertically, 77.6 percent of the employed are qualified, with 11.9 percent being overqualified and 8.6 percent being underqualified. From a horizontal assessment of the degree of correspondence between the field of training and the field of activity, 63.4 percent of those employed are in adequate jobs compared with 35.6 percent in inadequate ones.

## B Information mismatch

In addition to the prevalent skills mismatch explored above, labour markets in the MENA region also suffer from insufficient information exchange. One source of this particular mismatch is the limited number of channels providing information for jobseekers in relation to possible professional opportunities. Another source is the limited information provided by employers, unaware of the skills composition of jobseekers, access to the pool of jobseekers and how best to utilise their skills to maximise productivity and revenues. Finding tools to better connect these various information channels is essential for preparing the ground for the reconciliation of labour supply and demand.

In **Egypt**, the labour market outcome of the graduates is judged by the TVET education institution and its programmes and connections. The graduates of the more common TVET specialisations (nursing, tourism and hotel services) are better integrated into the labour market upon their completion of education. Other graduates of less common specialisations and institutions may spend more time and effort in finding jobs.

The Ministry of Manpower gathers information through its network of local employment offices regarding job vacancies and announces them in its monthly bulletin. However, most of these vacancies are blue-collar jobs with low salaries. This is in addition to the limited skills available at these offices to undertake proper screening of jobseekers. These two variables are the main reasons behind the modest placement rates achieved through this monthly bulletin.

Job fairs are considered a second method for matching jobseekers with appropriate jobs. The ILO Cairo office, in collaboration with the Ministry of Manpower, organised two job fairs to provide a platform for matching jobseekers with potential employers. The first job fair was organised in 2014 at a youth centre in the New Valley Governorate. This job fair attracted local authorities and representatives from the different ministries. The second job fair was organised in the Minya Governorate later in 2014. This second fair mainly addressed fresh graduates who are looking for a job opportunity. The outcome of these two job fairs was the matching of over ten thousand job opportunities with potential employees in the private and investment sectors.

In response to the labour market instability, the deterioration of unemployment rates, in addition to the deterioration in the quality of jobs and the increased informality, the government of Egypt has worked towards encouraging entrepreneurship, especially among young people. In this area, the Egyptian government has taken positive steps since 1991 with the establishment of the Social Fund for Development (SFD). Moreover, NGOs and microfunding institutions have started providing financial support as well as training and skills enhancement. Startup incubators are considered the most recent initiative to encourage entrepreneurship, mainly providing young people with a high level of education and skills with new and innovative ideas, with the incubators providing matches with potential investors.

In **Jordan**, the National Strategy for Human Resource Development (NSHRD) (launched in 2016) has addressed the need to match the requirements of the Jordanian labour market with the outputs of the educational system.

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**Entrepreneurship in Egypt**

Young entrepreneurs in Egypt are mostly male (only 11 percent are female) and are on average 27 years old. While 15 percent of young male entrepreneurs and 30 percent of females possess a university degree, 49 and 42 percent respectively hold a secondary technical degree. Young entrepreneurs, both male and female, are distributed among the wealthy quintiles with a larger concentration of females around the first and second quintiles, while males are concentrated in the third and fourth quintiles. Engagement in entrepreneurial activities among the young working-age population increased from 1.6 percent in 2009 to 5.4 percent in 2014. Meanwhile, the percentage of young people employed in the informal sector has declined from 65.3 percent in 2009 to 56.9 in 2014. The GoE efforts in promoting entrepreneurship are not spread widely enough and not accessible to all young people, especially the new entrants to the labour market. Challenges still exist that hinder young people in their attempts to pursue entrepreneurial activities. The main challenge and barrier to entry is access to credit. Additionally, the fear of not succeeding and bearing financial costs and incurring debt are the other kinds of challenges hindering entrepreneurial activities among young people. Accordingly, the young people benefiting from entrepreneurial activities are not amongst the target group of the unemployed, out of labour force or the informal workers.

In an attempt to match the demand and supply in the labour market, the strategy focused on the development of the TVET sector, working on identifying the interventions needed to improve the labour market outcome. The initiatives mainly aim at “increasing access to the training and education of TVET, improving the quality of graduates and establishing innovative ideas to improve the sector” with the main aim of enhancing participation in the labour market (SEO Amsterdam Economics, 2019).

In addition to the human resource strategy, the Government of Jordan has introduced the National Employment Technical and Vocational Education and Training Strategy. This strategy focuses on the relevance of education and training with respect to employability as well as on increasing the inclusiveness of the TVET system. This system mainly aims at ensuring a high quality of supply of labour to the market.

Despite the Jordanian Government’s efforts and even though the economy has managed to generate some 48,000 net new jobs in 2013, the majority of these jobs (over 60 percent) were not highly skilled jobs but medium and low-skill jobs requiring a secondary degree or below. These jobs were mainly in wholesale trade and retail, the public sector, transformative industries and education. Therefore, the problem still exists and is highly pronounced among highly educated Jordanians.

**Tunisia** has two public agencies tasked with matching supply and demand for labour, both abroad and nationally (Andrees et al. 2015): the National Agency for Employment and Self-Employment (ANETI) and the Tunisian Agency for Technical Cooperation (ATCT).<sup>45</sup>

ANETI, a non-administrative public establishment with legal form and administrative and financial autonomy, was established by Act No. 93-11 of 1993 and is attached to the Ministry of Vocational Training and Employment. Its main task is to implement the government’s policies on the promotion of employment, especially for young people. ANETI stimulates the labour market at national, regional, local and sectoral levels through its network of 108 local employment offices distributed over Tunisia’s 24 governorates.<sup>46</sup> Using this network, the agency registers job applications by category (age, governorate, qualification, etc.) and cross-checks them with job offers from companies. ANETI remains the recruitment channel most used by companies, whether for executives, skilled or unskilled workers.

In 2016, approximately 200,000 jobseekers were registered with ANETI (compared with 175,491 in 2015), with almost half of them being graduates of higher education and around 10 per cent being vocational training graduates. On the job supply side in 2016, approximately 80,000 vacancies were declared by all companies to ANETI, and 61 percent of them were successfully filled by ANETI.

Created in 1972 by the Act No. 72-35, ATCT is a public institution designed to implement the state’s policy in the field of technical cooperation by making available the Tunisian expertise sought for the benefit of the Arab and African countries in particular. Through its history, ATCT has succeeded in placing more than 45 000 co-operants and experts in various fields and with various countries. ATCT also organises training sessions for the benefit of more than 3,700 cadres from African and Arab countries in various fields such as health, education and environment.

<sup>45</sup> According to Articles 280 and 285 of the Labour Code, private labour recruiters have been generally forbidden from recruiting workers for the Tunisian labour market.

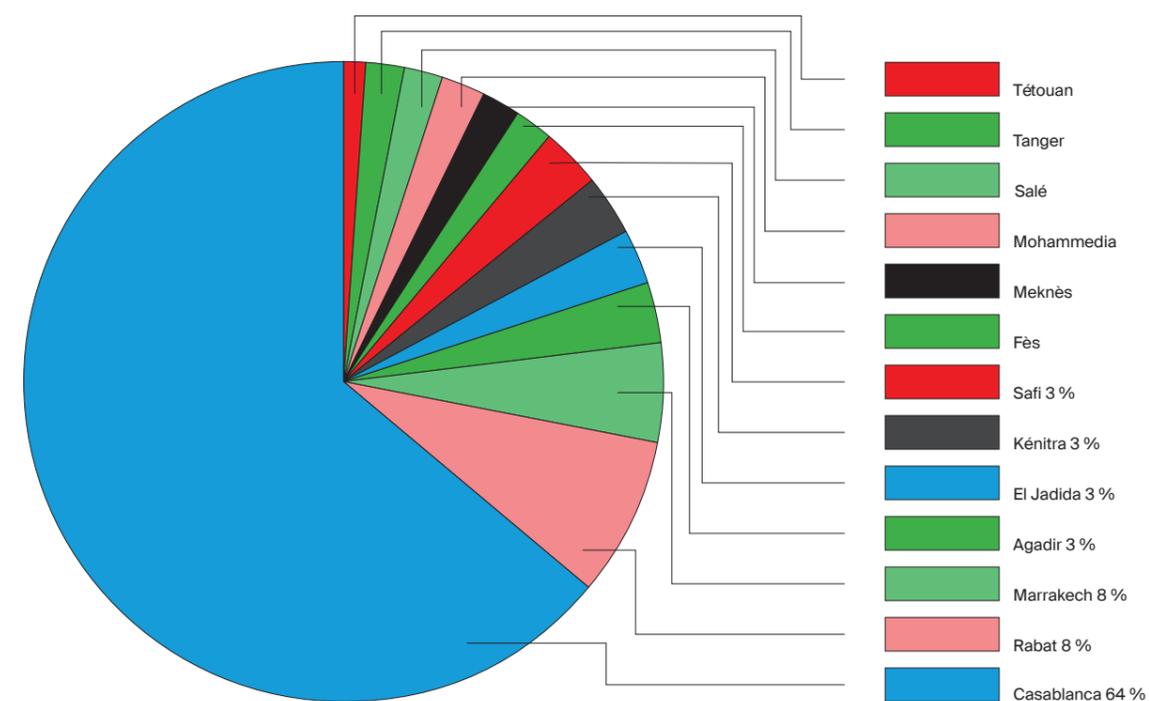
<sup>46</sup> Data for 2020.

In Morocco, the main objective of the National Agency for the Promotion of Employment and Skills (ANAPEC) is the promotion of the active policy for employment through its three main pillars: (i) promotion of salaried employment, (ii) improvement of employability and (iii) support for self-employment. It also works on providing support for national initiatives and sectoral strategies as well as providing a range of local services adapted to the different categories of employers and jobseekers and strengthening the territorialisation of their actions through the promotion of local initiatives for the promotion of employment.

In 2018, ANAPEC integrated more than 100,000 jobseekers in the professional environment, benefited more than 7,000 companies from the improved insertion contracts scheme, improved the employability of more than 27,000 jobseekers and created more than 1,000 socioeconomic activities.

Under the auspices of ANAPEC, 62 private recruitment agencies are authorised to carry out mediation in recruitment and hiring, 82 percent of which are concentrated in the economic city of Casablanca and capital city of Rabat.

Figure 12: Distribution by city of private recruitment agencies in Morocco (ARP), 2018 *Source: I'ANAPEC.*



The country-level efforts highlighted above acknowledges the existing mismatch in the national labour markets, while the country-specific efforts have led to a degree of improvement in the situation and has to some extent simplified the matching process. However, with the persistence of high unemployment rates among the educated working age population, dedicated efforts to close this gap are required on the long term.

The flaws of the education system are particularly evident as the education system is not providing the labour market with the required skills. In the meantime it is questionable whether employers can rely on proper mechanisms to interact and provide consistent feedback to the education system. The problem originates in a limited private sector that does not have the capacity to identify and provide information regarding conjectural or structural weaknesses in the supply of labour. This limited exchange of information prevents a readjustment and alignment of the education provision towards ‘marketable’ skills and competencies.

## C ALMPs to address mismatch

Active labour market policies (ALMPs) are interventions aiming to improve labour market outcomes and the employment of the most vulnerable groups in society and aim to reduce poverty and combat inequality. ALMPs aim to increase employment through supply and demand measures:

- Demand measures include encouraging self-employment and entrepreneurship,
- Supply measures include skills and training.

ALMPs also aim to match the demand and supply of labour by addressing labour market information by registering vacancies and offering employment services.

In response to the many problems identified existing across the labour markets of the non-oil MENA countries, governments have been undertaking initiatives and implementing policies that aim to improve the employment of the working age population. Outlined throughout this report are the main labour market issues identified for each country to be followed in this section by the most common policies implemented, and how effective these policies have been in improving the matching of the working age population with an appropriate job.

According to the previous discussion, the non-oil MENA countries have experienced significant progress in educational attainment. This education, however, did not automatically translate into job opportunities, where the most recurrent unemployment has been recorded among educated young people. This situation has been exacerbated by crippled job creation and the frictional mismatch between supply and demand in the labour market. Being overskilled and overeducated are, therefore, the main consequences of this mismatch. Labour mismatch in the non-oil MENA countries arises from:

- Insufficient demand for labour
- A growth in the size of the labour supply
- Acquiring skills and education that do not address the ones determined by labour demand

Additionally, the limited information available in the labour market regarding the skills and education possessed by the labour force, and the skills and education demanded by employers have added to the mismatch. This has magnified the effect of mismatches in terms of the performance of the labour markets and should therefore deserve equal attention from policy initiatives.

In this aspect, ALMPs have been identified as a multifunctional set of policies that do not only address employment, but rather embrace a mix of employment and social policies. They are usually policies of temporary duration that aim to speedily switch the labour market status of beneficiaries. ALMPs generally target three categories of individuals:

- Unemployed
- Employed at risk
- Inactive

A detailed breakdown of national ALMPs, including objectives, data and performance and covering all four countries is contained in **Annexe 4**.

# IV. International migration in Egypt, Jordan, Morocco and Tunisia

“The role that migrants play in promoting development and poverty reduction in their countries of origin, as well as the contribution they make towards the prosperity of destination countries, should be recognised and reinforced” (Global Commission on International Migration, 2005: 23). International migration has always been considered a demographic and socioeconomic phenomenon, one which is affected by both internal and external factors. The most important among these factors is the labour market at international level and the political conditions in both source and recipient countries (Choucri 1999). Migration policies in the source and recipient countries and regions are important in directing and influencing migration streams and migration corridors worldwide. In addition, the role of the international community and international organisations in developing and influencing migration policies is crucial for maintaining fair migration regulations and norms. This section reviews the recent situation in terms of international migration in four Mediterranean countries; Egypt, Jordan, Morocco, and Tunisia. It focuses primarily on voluntary migration from (emigration), to (immigration), and through North Africa (transit migration). This section also documents the views and policies and regional and international cooperation relating to international migration and human mobility in the region.

#### **Data and methods**

*Due to the differences between national estimates and comparable international data available, this section depends mainly on comparable data provided by the United Nations' international migration database and the World Bank's migration and remittances data. National estimates are also provided.*

## **A** Migration history

Egypt, Jordan, Morocco, and Tunisia are based in a highly mobile region. The four countries are countries of emigration, immigration, as well as transit countries. It is true to say that, except for Jordan, the other three countries are mainly countries of emigration. Going back to the history of migration in the four countries under investigation, one can see that the main migration stream of migrants from Morocco and Tunisia is mainly to Europe, while the main migration stream from Egypt and Jordan is mainly to the Arab Gulf countries. An in-depth discussion on each country's migration background and history is included in Annexe 5.

## B

## Levels and trends of international migration

The countries of the southern and eastern Mediterranean have experienced diverse migration flows. The Maghreb countries have been an important source of migration to Europe in addition to being themselves destination countries for migrants from countries in Africa and, in smaller numbers, from neighbouring countries. Egypt has mostly been a country of origin for workers migrating to the Gulf Cooperation Council (GCC) countries as well as being a country of destination for a number of migrants essentially from Sudan and the Horn of Africa. Jordan in the southern Mediterranean has been a country of immigration, emigration, as well as a transit country. Moreover, and due to its geographical proximity, North African and eastern Mediterranean countries have been a transit region for migrants intending to proceed northwards but not always fulfilling their migration desires.

Table 2: International migrants in EJMT by country of destination (2000–2019)

| Country | Year      |           |           |           |           | Percent evolution (2000–2019) |
|---------|-----------|-----------|-----------|-----------|-----------|-------------------------------|
|         | 2000      | 2005      | 2010      | 2015      | 2019      |                               |
| Egypt   | 184,774   | 285,006   | 310,017   | 353,641   | 504,053   | 173                           |
| Jordan  | 1,927,845 | 2,325,414 | 2,722,983 | 3,112,026 | 3,346,703 | 73.6                          |
| Morocco | 56,323    | 58,270    | 75,402    | 97,603    | 103,958   | 84.6                          |
| Tunisia | 36,719    | 35,040    | 43,172    | 56,532    | 57,455    | 56.5                          |

Source: Calculated from United Nations, Department of Economic and Social Affairs, Population Division (2019). Trends in International Migrant Stock: The 2019 Revision

## C

## Age/gender composition of migrants in EJMT

Two indicators are used to summarise the age composition of migrants in the countries of North Africa as shown in Table 3 below. The two indicators presented in the table are population by broad age groups and demographic/age dependency ratio. The first one indicates the age composition while the second indicator explores the age composition by indicating the number of migrants below the age of 15 and above 65 to the theoretically active age population of 15–64 years. The higher the age dependency ratio, the higher the burden on the working age population to sustain the burden of the other two groups in addition to themselves.

With respect to the population by broad age groups, it can be seen that the percentage of foreign population below 15 ranges between 10.9 in Egypt and 40.1 in Jordan. For the working age population (15–64), it ranges between 54.3 percent in Jordan and 85.1 percent in Egypt, and for the elderly population (65+), it ranges between 4.0 percent in Egypt and 8.8 percent in Morocco. In terms of the demographic/age dependency ratio, it can be seen that the high age dependency ratio in Jordan (84.1) reflects a family migration pattern, while the low age dependency ratios in other countries reflect a working age migration pattern.

Table 3: Age/gender composition indicators of migrants in EJMT by country of destination in 2019

| Country of destination | Gender         | Age group        |                  |                | Total            | Age Dependency Ratio |
|------------------------|----------------|------------------|------------------|----------------|------------------|----------------------|
|                        |                | 0–14             | 15–64            | 65+            |                  |                      |
| Egypt                  | Male           | 27,977           | 232,848          | 10,223         | 271,048          |                      |
|                        | Female         | 27,184           | 196,102          | 9,719          | 233,005          |                      |
|                        | <b>Total</b>   | <b>55,161</b>    | <b>428,950</b>   | <b>19,942</b>  | <b>504,053</b>   | <b>17.5</b>          |
|                        | <b>Percent</b> | 10.9%            | 85.1%            | 4.0%           | 100.0%           |                      |
| Jordan                 | Male           | 671,280          | 922,305          | 91,773         | 1,685,358        |                      |
|                        | Female         | 671,781          | 895,677          | 93,887         | 1,661,345        |                      |
|                        | <b>Total</b>   | <b>1,343,061</b> | <b>1,817,982</b> | <b>185,660</b> | <b>3,346,703</b> | <b>84.1</b>          |
|                        | <b>Percent</b> | 40.1%            | 54.3%            | 5.5%           | 100.0%           |                      |
| Morocco                | Male           | 8,240            | 37,531           | 3,708          | 49,479           |                      |
|                        | Female         | 8,010            | 36,129           | 4,956          | 49,095           |                      |
|                        | <b>Total</b>   | <b>16,250</b>    | <b>73,660</b>    | <b>8,664</b>   | <b>98,574</b>    | <b>33.8</b>          |
|                        | <b>Percent</b> | 16.5%            | 74.7%            | 8.8%           | 100.0%           |                      |
| Tunisia                | Male           | 4,259            | 23,275           | 2,210          | 29,744           |                      |
|                        | Female         | 3,769            | 21,577           | 2,365          | 27,711           |                      |
|                        | <b>Total</b>   | <b>8,028</b>     | <b>44,852</b>    | <b>4,575</b>   | <b>57,455</b>    | <b>28.1</b>          |
|                        | <b>Percent</b> | 14.0%            | 78.1%            | 8.0%           | 100.0%           |                      |

Source: Author's own calculation using the UN database 2019

## D

## Drivers of migration to EJMT

The drivers of migration vary from one country to another, but they are mainly economic and/or political drivers. Table 5 below shows the total number of migrants, refugees, and the percentage of refugees to total number of migrants. As shown in the table, the percentage of refugees among migrants varies from 1.3 percent in Tunisia to 87.5 percent in Jordan. From the same table, it can be seen that we are dealing with two countries, Egypt and Jordan, with a high percentage of refugees among international migrants. This indicates that the international migrants in these two countries are mainly asylum seekers and/or transit migrants. The other group of countries includes Morocco and Tunisia with a very low percentage of refugees among the international migrants.

This means that voluntary/economic migration in Egypt represents about 40 percent of the international migrants while in Jordan, economic migration represents about 13 percent of the international migrants. As for the second group of countries with a very low number of refugees, most of the international migrants are, supposedly, voluntary/economic migrants. Voluntary/economic migrants also include transit migrants. Libyans in neighbouring countries (mainly Egypt and Tunisia) represent a special category since they are neither registered as refugees nor involved in economic activities in host countries. They live on remittances they receive from abroad. Many of them also move back and forth between their countries of origin and destination. Hence, migrants in the four countries under consideration can be classified as:

1. Asylum seekers or refugees coming from neighbouring countries and other regions in Africa in the case of Egypt, Morocco, and Tunisia, and Syrian refugees in the case of Jordan,
2. Economic migrants, especially in the case of Morocco and Tunisia, or
3. Long stayers for non-economic purposes such as Libyans in neighbouring countries (mainly Egypt and Tunisia)

Table 5: Migrants and refugees in EJMT by country of destination (2019)

| Country | Migrants  | Refugees  | Percentage of refugees |
|---------|-----------|-----------|------------------------|
| Egypt   | 504,053   | 289,150   | 57.4%                  |
| Jordan  | 3,346,703 | 2,928,724 | 87.5%                  |
| Morocco | 103,958   | 6,779     | 6.5%                   |
| Tunisia | 57,455    | 737       | 1.3%                   |

Source: Author's own calculation using UN database 2019

## E EJMT migrants worldwide: emigration

Nowadays, it is difficult or even impossible to classify any country as solely a source or recipient country, although the main migration stream in EJMT is an emigration stream. While EJMT host about four million migrants, they have a stock of more than eight million emigrants worldwide.<sup>47</sup> As shown in Table 4, the number of emigrants in Egypt increased from 1.7 million in 2000 to 3.5 million in 2019. In Jordan, the number of emigrants increased from 369,000 in 2000 to 784,000 in 2019. The number of emigrants for Egypt and Jordan more than doubled in less than a decade. Moroccans abroad increased from 2.1 million to 3.1 million in the same period. As for Tunisia, emigrants increased from 487,000 to 813,000 within the period from 2000 to 2019. Two main destinations can be identified for the four countries under consideration; Europe and the Gulf. Europe is the main destination of Moroccans and Tunisians, while the Arab Gulf countries are the main destinations for Egyptians and Jordanians.

It is important here to refer to the different estimates of emigrants by national authorities and the United Nations estimates. For example, the national estimate of Egyptians abroad by the Government of Egypt is almost three times the UN estimate. While the UN estimate is about 3.5 million, the national estimate pushes the figure up to more than ten million. Keeping this in mind, and for the sake of using comparable and updated data, the United Nations estimates are presented below by country.

Table 4: International migrants for EJMT by country of origin (2000–2019)

| Country | Year      |           |           |           |           | Percent for 2019–2000 |
|---------|-----------|-----------|-----------|-----------|-----------|-----------------------|
|         | 2000      | 2005      | 2010      | 2015      | 2019      |                       |
| Egypt   | 1,708,513 | 1,901,661 | 2,611,870 | 3,187,593 | 3,547,626 | 207.6%                |
| Jordan  | 368,562   | 434,172   | 597,431   | 705,353   | 784,377   | 212.8%                |
| Morocco | 2,077,160 | 2,473,209 | 2,863,810 | 2,984,804 | 3,136,069 | 151.0%                |
| Tunisia | 486,980   | 579,219   | 616,386   | 759,817   | 813,213   | 167.0%                |

Source: Author's own calculations using UN database 2019

47 According to UN estimates. National estimates are much higher than UN estimates, especially in the case of Egypt.

## F Drivers of migration from EJMT

The main historical migration stream from Morocco and Tunisia was mainly motivated by colonial ties between the Maghreb<sup>48</sup> subregion and Europe. The reconstruction in Europe after World War II, where European countries, such as France, also set up recruitment centres in Morocco and Tunisia, is another factor. The Maghreb remains a “classic” area of emigration, most of it to Europe (Boubakri, 2004). Migration to the developed countries began after the World War II, with Egyptians going to developed countries for education and professional development (Al-Jalili, 2004). As for the current migration stream to Europe, the reasons of migration differ according to country of origin. A field study by Zohry (2009a) indicates that the recent Egyptian migration to Europe is a reproduction of the pattern of Egyptian migration to the Arab Gulf countries, where young males migrate to achieve specific financial goals and then return to their home country. Egyptian migration to Europe is different from other migration streams, especially the Maghreb countries. Egyptian migration to Europe is predominantly male-dominated and temporary migration in general, while Maghreb migration streams are dominated by males and females who intend to stay in the destination countries in general. Jordanian migration to the Arab Gulf countries is mainly motivated by high revenues in the Gulf for the highly skilled Jordanians and the high unemployment rates in the country of origin.

Generally speaking, the main drivers of migration from the EJMT are multifaceted. They are deeply rooted in the economic structure of the source and recipient countries as discussed in detail in the early chapters of this report. In line with previous findings, migration is the outcome of a complex interplay of demographic deficit in destination countries and high unemployment rates in origin countries, stimulated by economic ties and migration networks in the case of Maghreb, and/or by political instability (ie “Arab Spring”).

## G Transit migration

Transit migration can be regarded as one piece of a complex mobility puzzle (Castagnone, 2011). Human mobility is usually measured by two geographical points; origin and destination. However, intervening factors between the origin and destination play a major role in delaying the direct connection between the two dots. Consequently, migrants have to pass through an intermediate territory in order to reach their targeted destinations. As the front of the continent against the southern shores of the Mediterranean, and due to its geographical proximity, North Africa is regarded by many transit migrants as the gateway to Europe. Since the early 1990s, thousands of migrants have attempted to cross the Mediterranean to reach Europe. They come from a diverse array of countries and regions, not only from Africa, but also from Asia.

Transit migration through North Africa has put the relations of North African countries with their European neighbours under pressure. The tendency of the European countries to involve North African states in combating irregular migration and fighting migrant smugglers has resulted in more cooperation between the two parties regarding joint border control and security cooperation (de Haas, 2008). After “the Arab Spring” started in Tunisia in January 2011 and the consequent political instability in Tunisia, Egypt and Libya, hundreds of thousands of labour migrants left Libya and fled to Egypt and Tunisia. Irregular migration from North Africa to Europe was far below the level expected. Even so, the long period of instability in Libya since February 2011, and the political problems there made Libya the main point of departure for irregular/transit migrants making their way towards Europe (Zohry, 2013).

The problem of data availability, the absence of accurate data, and the discrepancies in the data from different sources and difference in time references of available data are major impediments to sound and evidence-driven faced by policy formulation in the MENA region.

48 The Maghreb subregion historically includes Algeria, Morocco, and Tunisia.

# V. Migration and development

Source and recipient governments increasingly recognise the value that migrants bring to development efforts and are seeking ways to expand the human capital and financial resources that migrants contribute to development of their home countries. Beyond the remittances they remit, migrant communities fulfil a key development role in their countries of origin: as major direct investors and contributors to the development of important sectors of the economy such as tourism, and in the development of human capital (Migration Policy Institute 2017). With their remittances, investments, skills, advocacy and engagement, migrants can play a major role in fostering development in their countries of origin.

Migrants may contribute in three important ways to the development of their home countries; remittances, transfer of knowledge they acquired abroad to their countries of origin, and investment. An elaboration of these three aspects in the context of the four countries under consideration is given below.

## A

### Remittances

In economic and financial terms, the most important aspect of migration for the source country is remitted money (usually cash transfers) and goods, the so-called remittances that migrants send back to family or friends at home. Such flows of wealth are important to both the families of migrants and to the economy of the source countries (Caldwell 1969). Formal remittances (sent via banks, post offices, exchange houses and transfer companies) are the only form that can be accurately measured. Their size and frequency are determined by factors such as the number of migrant workers, wage rates, exchange rates, political risk, economic activity in the recipient and source countries, the existence of appropriate transfer facilities, the level of education of the migrant, the number of people accompanying the migrant, the number of years since migration, and the difference in interest rates between source and recipient countries.

#### Remittance inflows

Table 7 below shows the volume and trends in remittances in EJMT from 2010 until 2019 and remittances as a share of GDP in 2019. Egypt is one of the top ten recipient countries of remittances with USD 26.4 billion remitted to Egypt by Egyptians abroad in 2019. Morocco ranked second with USD 7.1 billion remitted to Morocco in 2019. Remittances to Jordan by Jordanians working abroad amounted to USD 4.6 billion, while remittances to Tunisia ranked lowest among all the countries with USD 1.9 billion. Remittances' contribution to the GDP in the four countries was as high as 10.4 percent in Jordan and as low as 5.3 percent in Tunisia. Remittances as a share of GDP in Egypt amounted to 8.8 percent, while in Morocco, remittances amounted to 5.8 percent of GDP in 2019.

#### Remittance outflows

Tables 6 and 7 below show the remittance inflows and outflows from the EJMT countries. As shown in Table 6, remittance outflow from all countries is very low. The only exception is Jordan where it witnessed the highest level of outward remittances with USD 637 million in 2018. Remittances from Jordan amounted to 1.5 percent of the Jordanian GDP. Jordan is a source and recipient country for labour migration. Even so, the net situation of Jordan is positive since it receives about USD four billion more than what it sends.

Table 6: Remittance outflows from EJMT 2010–2018 (USD million)

| Migrant remittance outflows (USD million)        | Egypt       | Jordan      | Morocco     | Tunisia   |
|--|-------------|-------------|-------------|-----------|
| 2010   | 305         | 605         | 62          | 13        |
| 2011   | 293         | 550         | 71          | 19        |
| 2012   | 293         | 685         | 64          | 18        |
| 2013   | 355         | 535         | 63          | 20        |
| 2014   | 351         | 675         | 100         | 28        |
| 2015   | 623         | 597         | 79          | 26        |
| 2016   | 352         | 570         | 107         | 27        |
| 2017   | 271         | 673         | 112         | 29        |
| 2018   | 515         | 637         | 138         | NA        |
| <b>Remittances as a share of GDP in 2018 (%)</b> | <b>0.2%</b> | <b>1.5%</b> | <b>0.1%</b> | <b>NA</b> |

Source: Extracted from: World Bank (2019) Remittance Outflows 2019.

Table 7: Remittances inflows to EJMT 2010–2019 (USD billion)

| Migrant remittance inflows (USD billion)         | Egypt      | Jordan      | Morocco    | Tunisia    |
|--|------------|-------------|------------|------------|
| 2010   | 12.45      | 3.62        | 6.42       | 2.06       |
| 2011   | 14.32      | 3.68        | 7.26       | 2.00       |
| 2012   | 19.24      | 3.85        | 6.51       | 2.27       |
| 2013   | 17.83      | 5.34        | 6.88       | 2.29       |
| 2014   | 19.57      | 6.37        | 7.79       | 2.35       |
| 2015   | 18.33      | 5.35        | 6.90       | 1.97       |
| 2016   | 18.59      | 4.37        | 6.38       | 1.82       |
| 2017   | 24.74      | 4.43        | 6.82       | 1.89       |
| 2018   | 25.52      | 4.47        | 6.92       | 1.89       |
| 2019   | 26.35      | 4.61        | 7.07       | 1.94       |
| <b>Remittances as a share of GDP in 2019 (%)</b> | <b>8.8</b> | <b>10.4</b> | <b>5.8</b> | <b>5.3</b> |

Source: Extracted from: World Bank (2019) Remittance Inflows 2019.

As for the impact of remittances at macro level, remittances contribute to balancing the current account deficits. In addition, empirical studies indicate that a major proportion of remittances is used for daily household expenses such as food, clothing and healthcare. A study in Egypt indicates that 86 percent of recipient households used remittances for daily household needs (Zohry, 2016). These findings should not undermine the contribution of remittances in developing human capital through expenditure on health and education (Zohry, 2014).

## B Transfer of knowledge by expatriate nationals

In addition to monetary and in-kind remittances, knowledge and skills that expatriate nationals acquire while abroad can be an asset to the country of origin. Due to the simplicity of quantifying remittances, they are over-researched compared to the transfer of knowledge by expatriate nationals, which is difficult to quantify (Zohry, 2014). In terms of the transfer of knowledge by expatriate nationals, it should be noted first of all that the countries under consideration lack a database of their highly skilled expatriates. Providing a database of this important category is a key factor in the development of effective policy in this regard. In general, most countries lack a systematic policy to attract these skills, unlike what we find in many recipient countries (Khachani, 2014).

Except for Jordan,<sup>49</sup> all other countries have ministries or offices that are responsible for their national expatriates. However, the policies of these countries in this regard are limited, with more attention given to remittances rather than skill transfer. Even so, several diaspora organisations were established in the countries of destination to facilitate the process of knowledge transfer to the countries of origin, especially for specialised frameworks such as the *Maghreb Engineers Federation in France*, the *Association of Doctors of Maghreb Origin in France*, the *Association of Cultural Exchange France-Maghreb*. Such initiatives remain limited in their ability to make a difference in the countries of origin.

## C Investment

As for measures to attract investment by expatriate nationals, Egypt, Jordan, Morocco, and Tunisia all have systems in place to reduce the costs of transferring remittances by developing new financial channels and arrangements with major destinations. Measures include promoting bilateral agreements, opening branches of national banks in destination countries, such as the Moroccan banks' branches in France and other destinations in Western Europe. Measures also include promoting electronic transfers through mobile telephones such as the Egyptian experience with migrants in the Arab Gulf countries and Jordan. Incentives also include tax exemptions for return migrants and expatriates' investments in their home countries as well as preferential treatment in providing credits or allocation of licences.

With respect to encouraging the return of emigrants to their countries origin, many countries in the world adopt initiatives to encourage the return of skilled citizens living abroad to contribute to the development of their countries of origin. All countries in the region have policies in place to encourage their citizens to return, especially the highly skilled migrants (United Nations 2017). However, return policies are not only about encouraging return. Measures for reintegration into the labour market and social life should be considered. For example, the data available on Egyptian return migrants indicates that return migrants have higher levels of human capital than non-migrants, and are likely to be more entrepreneurial the longer they have worked abroad (Wahba, 2007).

49 In Jordan, expatriates are under the mandate of the Ministry of Foreign Affairs and Expatriates.

## D

## Brain drain and migration of the highly skilled

The qualifications of the Arab migrants in OECD countries has varied depending on the country of origin from the region. Even though migrants from Egypt and Jordan are relatively highly qualified, and those from Tunisia and Morocco often have low qualifications, the expatriation rate of highly skilled Moroccans (17–19 percent) and Tunisians (12.5–21.4 percent) is high compared to Egypt and Jordan. In other words, most of the highly skilled Egyptians and Jordanians are concentrated in the United States and Canada, while those from Tunisia and Morocco are concentrated in Europe (ILO, 2009).

While Morocco and Tunisia benefit from their migrants' remittances and are putting measures in place to increase the inflow of remittances, they are making less effort to harness the other benefits of the links between migration and development, especially the transfer of knowledge via expatriate nationals. In addition to remittances, Morocco and Tunisia should strengthen the links between migration and development, especially the transfer of knowledge via expatriate nationals, in order to mitigate the adverse impact of brain drain.

Currently, a stream of highly skilled and well-educated graduates from the Maghreb region depart to Europe regularly through head-hunting programmes, especially in the fields of information technology and medical and health professions and specialisations. This trend is shaped by the proximity of the region to Europe and the historical ties. It is critical to identify what some of the policy options are that Morocco and Tunisia can pursue to minimise the negative impact of the brain drain while simultaneously maximising the positives through diaspora engagement and knowledge circulation.

# VI. Institutional Frameworks

The following section provides an overview of the institutional landscape governing mobility of labour in the four countries. In this sense, it identifies institutional stakeholders and major legal frameworks responsible for organising and regulating labour mobility in and out of these countries.

There are several bodies associated with migration in EJMT to the extent that all ministries of each country can be considered connected in one way or another with migration issues. However, the ministries that are considered to be directly involved in this field include the Ministries of Foreign Affairs, Interior, and Labour, as well as direct ministries or bodies devoted to migration in some countries. Egypt, Morocco, and Tunisia have ministerial-level representation for migration issues. In Jordan, the mandate for migration comes under the Ministry of Foreign Affairs and Expatriates. In Egypt, a “Ministry of State for Migration and Egyptian Affairs Abroad” was established in 2015. In Morocco, migration issues come under the mandate of the “Ministry in Charge of Moroccans Living Abroad and Migration Affairs.” In Tunisia, in addition to many other institutions, the Secretary of State for Immigration and Tunisian Expatriates is in charge of migration issues. The institutions governing labour migration differ from country to another. The national institutions and their functions by country are shown below.

## A Migration governance in Egypt

Two main components related to labour migration governance are elaborated on below; namely implementing institutions and legal sources for labour migration.

### 1. Implementing institutions

Policy formulation in Egypt is highly centralised and adopts a top-down approach, necessitating the approval of the Presidential administration and the Council of Ministers or trusted advisors. Decision making within the ministries is also concentrated at the top.

The Ministry of Manpower in Egypt is the primary public employment service agency for Egyptians wishing to work abroad. Additionally, there are usually more ministries and authorities that implement employment policies in Egypt. Coordination between the different ministries and authorities is therefore needed for the success of any holistic and comprehensive national employment strategy. In addition to the role of the ministries, there are other key institutions involved in migration governance in Egypt, including international organisations (The World Bank, ILO, IOM), International Development Agencies (USAID, EU and GIZ) and research-oriented think tanks (ERF and CMRS AUC).

### 2. Labour migration legislation

There are various laws relating to the recruitment of migrant workers more specifically. The most important of these relevant laws and regulations for the governance of the migrant workers recruitment process in Egypt are presented below (Abdelaziz and Zohry, forthcoming).

#### a) Egyptian National Labour Act

The primary legislation for protecting migrant workers during the recruitment process is the section on employment in the National Labour Act of Egypt. Articles 17 to 24 are directly related to the recruitment of migrant workers. Article 17 specifies that the recruitment of migrant workers shall only be through the ministry in charge of labor recruitment, other relevant ministries and governmental bodies, the General Federation of Egyptian Trade Unions, Egyptian public and private sector companies with signed agreements with foreign entities within the limits of their activities and mandates, recruitment agencies that are licensed by the competent ministry in charge, and professional syndicates, who can facilitate the recruitment of their members only. Article 18 stipulates that international organisations may be engaged in the recruitment of migrant workers only through a contract with governmental bodies or Arab or foreign public bodies.

The Labour Act also puts the Ministry of Manpower, in cooperation with the Ministry of Foreign Affairs, in charge of monitoring the implementation of international agreements and contracts related to Egyptian workers abroad and can discuss the settlement of disputes arising from the implementation of these agreements and contracts. Article 20 stipulates that the parties referred to in the previously mentioned articles of this act shall submit to the competent ministry a copy of the request it received for Egyptian migrant workers. The request should include the provision of employment opportunities. The parties shall also provide a copy of agreements and work contracts concluded, including conditions of employment, salary and the worker's obligations under the contract. The Ministry then has 10 days at most to express any objections in the event the agreements and/or contracts do not comply with the general rules of employment. If the 10-day period expires without any objections from the Ministry, the agreements, applications, and contracts shall be deemed to have been approved.

Article 21 prohibits the parties referred to in Article 18 from taking any remuneration from the workers for their employment. However, the costs for the recruitment process of the migrant worker shall be paid by the employer. Notwithstanding the provisions of the preceding paragraph, the companies referred to in Article 17 (e) of this act may charge an amount not exceeding 2% of the remuneration of the worker for the first year of employment as administrative expenses only. The act also outlines the conditions for recruitment agencies to become licensed by the government as well as the conditions that may lead to the revocation of a licence. It is significant to note that one of the conditions that may lead to the revocation of an agency's licence is having the migrant worker pay more than the amount stipulated under Article 21 of the Labour Act.

#### **b) Act No. 111 of 1983 on the Migration and Welfare of Egyptians Abroad**

Egypt's Migration Act does not specify any provisions regarding the recruitment of migrant workers. However, it sets out two significant tasks for the ministry in charge of migration affairs, currently the Ministry of State for Migration Affairs and Egyptians abroad. Firstly, it stipulates that the competent ministry is in charge of cooperating with other ministries and relevant agencies regarding proposing drafts of acts and decisions relating to migration. Secondly, it instructs the ministry to propose bilateral labour agreements with foreign countries to provide better access for Egyptian workers to foreign markets and facilitate their stay in their countries of destination. It also asserts that the role of the ministry is to protecting the rights and interests of Egyptian migrants abroad. While these provisions do not address recruitment in a direct sense, they remain significant to the recruitment process since the major objective of concluding bilateral labour agreements is to facilitate the recruitment of migrant workers while providing the best protection to migrants who migrate under the agreements.

#### **Act No. 76 of 2016 on Organising the Employment of Egyptian Workers in Foreign Entities**

The Act on Organising the Employment of Egyptian Workers in Foreign Entities is primarily significant in shaping the mandate of the Ministry of Interior with regard to migration affairs. This Act outlines the rules, procedures, and penalties regarding obtaining work permits which are required for migrant workers who are travelling to work for a foreign entity. It also includes the rules, procedures, and penalties regarding the renewal of such permits. The provisions of the Act are significant for labour recruitment because it gives the Ministry of Interior the mandate to detect fraudulent recruitment activities. In order to obtain such permits, the relevant departments of the Ministry of Interior, which are explained in the following section, must ensure that the workers' contracts are valid.

#### **Act No. 82 of 2016 Regarding Combating Illegal Migration and Migrant Smuggling**

A significant step taken by Egypt towards combating irregular migration was the adoption in 2016 of the Act Regarding Combating Illegal Migration and Migrant Smuggling. The Act begins by providing important definitions including transnational crimes, organised criminal groups and migrant smuggling. Article 2 is dedicated to crimes and punishment. The Act severely punishes smugglers who exploit migrants. Article 5 penalises anyone who establishes, organises or manages criminal groups/networks for the purpose of smuggling migrants. The Act also criminalises and specifies punishments for those who are members of such groups and even intermediaries between the aspiring migrants and criminal networks.

## **B** **Migration governance in Jordan**

There is various legislation related to the recruitment of migrant workers in Jordan. The most important of these relevant acts and are explained in the following section.

#### **Jordanian Labour Act**

The primary legislation relating to the labour force in Jordan is the Jordanian Labour Act No. 8 of 1996. Since the promulgation of this Act, it has been amended several times in response to the needs of the labour market as well as the Jordanian commitment to international labour conventions (Olwan, 2007). The last amendment of the Act occurred in 2019. The 1996 Act was amended by Act No. 14 of 2019. Most of the articles of the amended Act deal with the organisation of the local labour market as they relate to the national labour force. As with the majority of national labour legislation worldwide, the Jordanian legislation strictly regulates the recruitment of non-Jordanian workers. The Act requires the approval of the Ministry of Labour for the recruitment of non-Jordanians, provided that the type of work for non-Jordanians requires experience that the local labour market is lacking. The Act entrusts the Ministry of Labour with the tasks of organising and monitoring the performance of the national labour market.

#### **Ministerial Resolutions**

An array of ministerial resolutions have been issued to regulate the Jordanian labour market. The most recent resolution is Ministerial Decree No. 19 of 2019 on "Closed Occupations, Restricted Professions and Occupations with Specialised Skills for Non-Jordanian Workers." This decree aims to adjust the Jordanian labour market and not allow migrant workers to work in areas where Jordanian workers would prefer to be.

The following professions are open to Jordanians but closed to foreign workers:

1. Administrative and accounting professions
2. Clerical work, including typing and secretarial work
3. Switchboard, telephone and connection work
4. Warehouse work
5. Sales work, including all groups
6. Decoration work
7. Selling fuel in main cities
8. Electrical professions
9. Mechanical and car repair professions
10. Drivers
11. Guards and servants

#### **Act No. 9 of 2009 on Combating Human Trafficking**

Act No. 9 of 2009 (Combating Human Trafficking) consists of 17 articles. Articles 1–3 include general provisions and definitions including the definition of human trafficking crimes. Articles 4–7 stipulate the foundation of the "Anti-Human Trafficking National Committee" chaired by the Minister of Justice. The Act stipulates the mandate of the committee and the foundation of shelters for the victims of human trafficking. Articles 8–15 stipulate the penalties of human trafficking crimes. Articles 16–17 include final provisions.

The National Strategy to Combat Trafficking in Persons in Jordan is based on four pillars; prevention, protection, juridical prosecution, and building local, regional and international partnerships and local, regional and international cooperation and enhancing transparency.

## C Migration governance in Morocco

Two main components related to labour migration governance in Morocco are elaborated on below; namely implementing institutions and legal sources for labour migration.

### Main implementing institutions

The main institutions responsible for implementing employment and migration policies are as follows, with details of the main role of every institution provided in Annexe 5 to the report:

The Ministry of Labor and Professional Integration (MTIP)  
 The Ministry Delegate to the Ministry of Foreign Affairs and Cooperation  
 The National Agency for the Promotion of Employment and Skills (ANAPEC)  
 The Office of Vocational Training and Promotion of Work (OFPPT)  
 Other public organisations

### Primary labour market/migration legislation

In terms of employment, the last few years have been marked by the emergence of a whole series of legislative and regulatory texts which are of major importance in the enrichment of the national legislative framework. These include, in particular, the alignment of national legislation - in the area of social protection of workers, promotion of decent employment and favourable working conditions - with the international standards in force, and adapting the legislative corpus to the expectations of the various economic and social stakeholders in the country.

In the field of migration, the National Strategy of Moroccans living abroad aims to achieve three main objectives, including the preservation of the Moroccan identity of Moroccans in the World (MDM), the protection of their rights and interests and the strengthening of their contribution to the development of the country and to the promotion of its image, its values and its culture abroad. These strategic objectives are broken down into 10 specific objectives, which are structured into 8 programmes (6 sectoral and 2 transverse), 39 projects and 104 actions.

The National Immigration and Asylum Strategy (SNIA) aims to ensure better integration of immigrants and better management of migratory flows within the framework of a coherent, global, humanist and responsible policy. Its implementation is structured around 7 sectoral programmes (education and culture, youth and leisure, health, housing, social and humanitarian assistance, vocational training, employment) and 4 transverse programmes (flow management and the fight against trafficking, cooperation and international partnerships, regulatory and conventional framework, governance and communication), comprising 27 objectives and 81 actions.

## D Migration governance in Tunisia

Four main issues related to the governance of migration in Tunisia are explored below. These four issues are (1) Employment policy framework and objectives, (2) Primary implementing institutions, (3) Primary labour market/migration legislation, and (4) Labour market programmes.

### Employment policy framework and objectives

Recent empirical investigations prove that migration and mobility were not perceived as a priority, neither by the Tunisian society as a whole nor by Tunisian decision makers (Abderrahim 2017). After the revolution of 2011, two phenomena have been observed: a departure of Tunisians, either regularly or irregularly, to the EU or to the Arab countries, and a massive arrival of immigrants, from different origins, living in different cities of the country and carrying out professional activities in both formal and informal sectors. This new reality, taking place in a

particular economic and social context, has led to a growing public interest (from all countries of the world and especially those of the Mediterranean) in the issue of migration. New actions (security, employment policies, etc.) have been taken to better manage migration.

Scant and lax though the labour migration policy framework in Tunisia might be, it does not shy away from issues deemed to be of paramount strategic importance. This is the case when it comes to social protection of Tunisian migrant workers as well as their families living in the country, which was addressed through international social security bilateral conventions concluded with neighbouring countries and with the countries of destination of Tunisian migrant workers. This is also the case of the legal framework underlying investments by foreigners in Tunisia, aside from general legislation. Likewise, the Tunisian legislative arsenal strictly organises temporary labour migration and suffers from a number of shortcomings with regard to the rights of foreign nationals (especially in terms of protection against deportation, legal appeals, family reunification, and refugee status). For instance, Tunisia is reluctant to sign the Convention on the protection of all migrant workers and members of their families but is committed internationally and bilaterally to the benefits of labour movement as well as to readmission and border control. Tunisia is thus trying to combine its interest in promoting the mobility of its citizens with its desire to control them and to regulate the flow of entrants. In 2014, the European Union and Tunisia signed an action plan for 2013–2017 which granted Tunisia the status of preferred partner. This agreement aims to reinforce financial support, trade openness, and the improvement of mobility. The two sides agree to enter into a dialogue regarding migration with the aim of concluding a mobility partnership for cooperation on the movement of people, the management of legal migration, migration and development, the protection of the rights of migrants, the fight against illegal migration and the readmission of migrants (Kriâa 2016).

Generally speaking, the internal regulatory system that governs migratory flows of Tunisians and foreigners, whether at the point of entry to or at the point of exit from Tunisian territory, as well as that which governs the stay of foreigners in the country comprises three types of texts: texts related to the regulation of entry, stay and exit of foreigners in Tunisia; texts related to the regulation of the work of foreigners in Tunisia; and texts related to the regulation of the migration of Tunisians abroad and their temporary, prolonged or permanent return to Tunisia.

### Main implementing institutions

When it comes to implementing labour market and migration policies for nationals/internationals, the onus is on a wide range of institutions and organs comprising the Secretary of State for Immigration and Tunisians Abroad (SEITE), the National Observatory of Migration (ONM), the High Consultative Council of Tunisians Abroad, the Ministry of the Interior, the Ministry of Justice, technical ministries such as the Ministry of Education, the Ministry of Health, and the Ministry of Higher Education, the Ministry of Social Affairs (MAS), the Office of Tunisians Abroad (OTE), the Ministry of Foreign Affairs (MAE), the Ministry of Vocational Training and Employment (MFPE), ANETI, ATCT, and the one-stop shops (Kriâa 2016). The following is an outline of the implementing institutions with a list of the remit of each institution or organ available in Annexe 5 to the report:

|   |   |
|---|---|
| SEITE   | OTE   |
| ONM   | MAE   |
| The High Consultative Council of Tunisians Abroad | MFPE  |
| The Ministry of the Interior                      | ANETI   |
| The Ministry of Justice                           | ATCT  |
| The technical ministries                          | One-stop shops, such as the OTEs and the APIs |
| MAS   |   |

The merits thereof notwithstanding, the aforementioned institutions and organs often have to rely on partial, incomplete, and fragmentary information that is neither shared nor harmonised. These same institutions rarely communicate with each other systematically. The exchange of information is limited in both quantitative and qualitative terms for want of the necessary involvement from institutional stakeholders. Finally, the absence of institutional leadership on the multidimensional issue of migration is bound to thwart the implementation and governance of migration policy (Martín 2013).

It is worthwhile noting that over and above the aforementioned public institutions and organs, the implementation of labour market and migration policies for the benefit of nationals/international, albeit vicariously, from the

endeavours and projects carried out by other organ, whether public or private, such as the University missions abroad - chief amongst which are the university and educational missions of Tunisia in Paris and the Tunisian university mission in Montreal; migrant associations including local development associations, associations of social and charitable actions, and associations of migrants' families; NGOs and foreign organisations such as IOM, ICMPD, HCR, and OFII; and authorised private foreign placement establishments in the vein of Manpower Tunisia, Adecco Tunisia, Express solutions, Bouhajla, the Tunisian Source Academy, and TUNISKILLS.

### Primary labour market/migration legislation

Nearly 14 bilateral conventions, including 9 with European countries, have been concluded by Tunisia with the aim of resolving legal conflicts and coordinating legislation in order to guarantee and protect the social security rights of migrants. However, a sizable number of Tunisian expatriates, particularly in the Gulf countries, the countries of Eastern Europe, and the countries of North America, remain excluded from bilateral conventions. Likewise, the labour code permits the same rights to migrant and national workers, notably in terms of retribution, protection against discrimination, forced labour and harassment, minimum age for work, protection against accidents at work and illness, and right to vocational training. Foreign personnel must also submit to the same obligations stipulated for the Tunisian workers in Article 263 of the Labour Code. It therefore the duty of the employer to comply with existing requirements for the protection of employees and prevention of occupational risks. These requirements stem from or pertain to a legal corpus encompassing the Constitution of the Republic of Tunisia; Act No. 68-7 of 28 March 1968 relating to the working condition of foreigners in Tunisia; Decree No. 1968-198 regulating the entry and stay of foreigners in Tunisia; and the Labour Code amended by Act No. 96-62 of 15 July 1996.

In a similar vein, the legislation on investments by foreigners in Tunisia represents a framework whereby fully exporting companies can recruit foreign management and supervisors up to a limit of four for each company, beyond which companies must comply with a recruitment and "Tunisification" programme approved beforehand by the Ministry of Vocational Training and Employment and tantamount to a provision in Article 18 of Act No. 93-120, whereby foreign workers benefit from such facilities such as the payment of a tax rate set at 20 percent of gross earnings and the exoneration from customs duties and equivalent duties and so-called import taxes on personal effects and a passenger car for each person. Besides, Article 8 of the Constitution grants the right to organise so that a foreigner can join a union if he obtains the agreement of the Secretary of State for Youth, Sports, and Social Affairs (Kriâa 2016).

Furthermore, acts have been promulgated since the independence of Tunisia to regulate on the one hand the condition of foreigners in Tunisia and on the other hand the movement of people (Tunisian or foreign) at the country's border crossings. These are Act No. 68-7 of 8 March 1968, relating to the conditions for foreigners in Tunisia and the Act of 14 May 1975, aimed at regulating the conditions for issuing passports and travel documents to Tunisians or foreigners stripped of their travel documents.

The governance of the residence of the foreigner in the country and the lack of Tunisian skills in the sector concerned by the recruitment (Art. 258-2 of the Labour code) are part of the criteria with which the authorisation granted by the competent authorities must comply. The employment contract is always for a fixed term and its renewal is limited. The sector of activity and the region in which it is taking place must be mentioned in the contract, which precludes free professional or geographic mobility without the authorisation of the Ministry of Labour.<sup>50</sup> Finally, irregular emigration is punishable by between one month and one year in prison and a fine of between 6 to 120 dinars (Act of 1968), while irregular departures for national citizens are punishable by between 15 days and 6 months in prison and/or a fine of between 30 and 120 dinars.<sup>51</sup>

### Labour market programmes and international cooperation

Labour market programmes consist mainly of partnerships pertaining to EU policies related to migration. The most salient partnerships include the Euro-Mediterranean Partnership (hereinafter referred to as the EMP), the EU-Tunisia Association Agreement, the 5+5 Dialogue, the European Neighbourhood Policy (ENP), the Mobility Partnership, the LEMMA Project (2016-2019), the "ProGreS Migration Tunisie" Project<sup>52</sup>, the Readmission Agreement and Visa Facilitation Agreement, and the Rabat and Khartoum Processes (Flayols 2019).

50 Cf. Articles 259 and 262 of the Labour Code.

51 Cf. Act of 1975.

52 Also known as Projet Gouvernance et Stratégie.

Several bodies are associated with migration in each country of EJMT to the extent that a plurality of Ministries in each country are responsible for varying segments of the migration portfolio leading to significant policy sectors overlap and unclear demarcation of responsibilities and prerogatives. In addition to this, the top-down approach related to migration policymaking has hindered the proper formulation and implementation processes.

# VII. Labour (mis)match and migration policies for foreigners

Labour market regulations and legislation in the four countries under investigation are intended to manage the national labour market and, by default, grants more privileges to citizens compared with foreigners. In fact, this is not the case in just the four countries, but a general and common practice all over the world. Labour legislation in the four countries is not an exception. In addition, all four countries exclude foreign labour except under specific conditions. The most important condition is that the foreign labour does not compete with national labour.

The four countries specify strict rules for hiring foreign labour. Some countries, such as Egypt, have in place measures for recruiting foreigners and set quotas for their numbers in companies. Also, some countries reserve some jobs for nationals. However, due to the current conditions in the region and the political instability both inside the region and faraway in other African regions, some countries are regarded as destinations for refugee, economic migrants and transit migrants.

Recipient countries, other than Jordan, don't actually need foreign labour. They already suffer high unemployment rates and disguised unemployment. With the presence of massive numbers of refugees, economic migrants, irregular migrants, and transit migrants, countries, such as Egypt turned a blind eye and let refugees and undocumented economic migrants work in the informal sector. Despite the goodwill of government, allowing migrants to join the informal labour market exposes them to an array of issues. Moreover, they are regarded by the semi-skilled nationals as competitors since they may accept lower wages than nationals.

With the support of foreign aid, countries in the region can continue to host refugees and foreigners for a while, but durable solutions should be strived for. The Jordan Compact is an example of this support. The Jordan Compact was agreed upon in February 2016 at the Supporting Syria and the Region Conference in London. The Compact stipulated that the Government of Jordan must improve access to education and legal employment for its Syrian refugees by offering 200,000 job opportunities over a period of three years in return for USD 1.7 billion to Jordan in the form of grants and loans.

Another example of migrants' assisted aid is the EU Trust Fund for Africa which finances operational projects. Both Jordan Compact and the Trust Fund for Africa cover not only foreigners but also nationals who are residing with them. Given the high unemployment level in the host countries and the political fragility, all of these initiatives represent temporary solutions, and the pressure on the host countries will increase if this aid stops. Long-term solutions should be strived for and implemented.

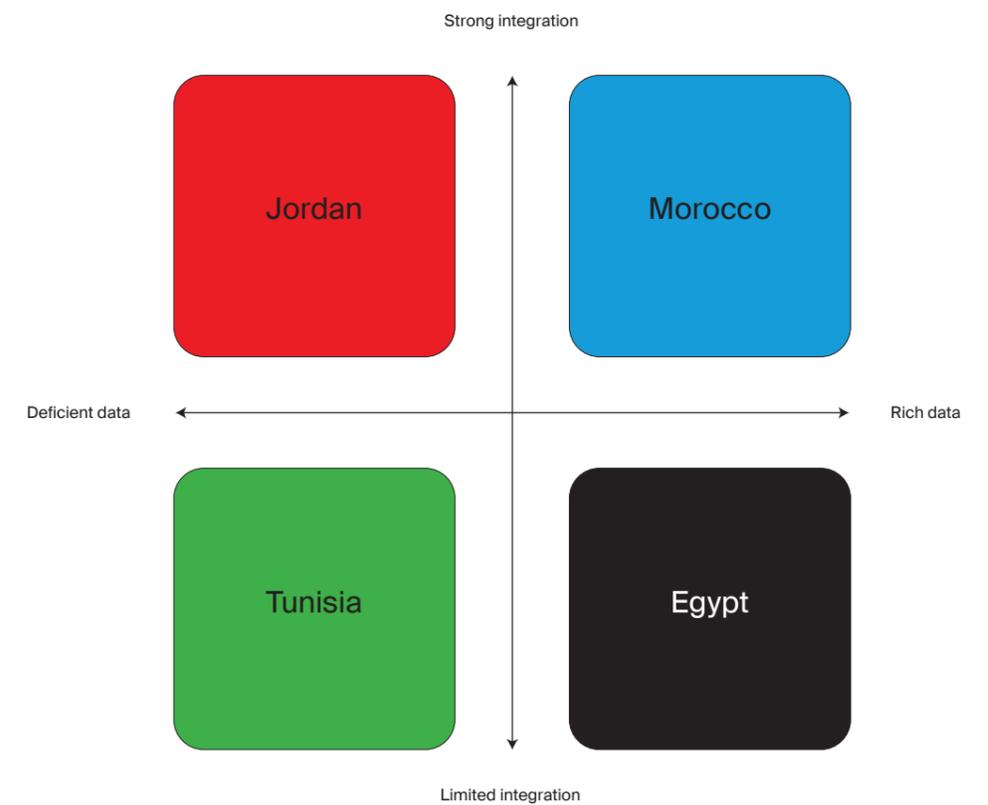
# VIII. Recommendations

The previous sections have highlighted the main issues pertaining to education and labour markets, and what governs the relationship between both of them and results in a lack of proper matching between the two has been compounded by policies that themselves magnify these issues. Not only at the level of education and the labour market, but migration initiatives and policies have actually not capitalised on the countries' resources (human capital) to maximise the benefits of migration.

The detailed analysis of the education system, labour market and migration with integration among them pertaining to the four countries studied have raised issues that severely impact labour market outcomes. The situation for young people in the four countries suffer from the limited integration of education, labour market and migration policymaking.

It can be concluded from the previous analysis that variation exist in the extent to which policies are integrated to produce a better option for the increasing working age populations of the four countries. This conclusion is highlighted through the matrix below, combining the data availability with the integration of policies. These two aspects define to a large extent the situation in the four countries. Poor or missing data cripples the understanding of the situation and challenges and future planning and policymaking. The integration (or the lack thereof) between the policies is the main driving force for the mismatch problems existing in the four countries.

Figure 13: Matrix on data availability and policy integration



Accordingly, recommendations are needed to improve the situation of the educational system, the labour market outcomes, policy integration and data availability that would improve the situation of the working age population in the four countries. Below is an elaboration of these aspects and the specific recommendations.

## A International cooperation in the Euro-Mediterranean region

National action in each of the four countries concerned to put in place the measures required to tackle a number of issues in relation to migration management. On another level, international cooperation is needed in the Euro-Mediterranean region to formulate and put in place the measures mentioned in the following subsections.

## B Education

For education, the following recommendations are envisaged:

- Structural reform of the education system ensuring the alignment of educational outcomes with labour market demand
- Improvement in the regional targeting of education programmes
- Development of human resources to meet the demand for labour in the domestic and external labour markets
- Support for higher education and professional training infrastructures across the different regions within the country
- Limit to the centralisation of education provision to reduce redundancy and costs and improve quality
- Widening of the circle of beneficiaries of vocational education while improving the diversity of programmes
- Support for public/private and private/private partnerships for improving the infrastructure, and for targeting and updating curricula
- Encouragement for partnerships with industries for the provision of the right education programmes (especially for TVET) that are in high demand on the labour market
- Reorientation of the traditional vocational training sectors towards new professional disciplines and future professions in fields of important investments in particular
- Support for soft skills programmes to better qualify young jobseekers, even the educated amongst them
- Introduction of evaluations based on quality assurance criteria in pre-university education.
- Encouragement for higher education institutions to obtain international certification and to develop partnerships with the private sector.

## C Labour market

The following recommendation pertain to labour market performance and outcomes:

- A structural regional reform of the employment and self-employment policies
- Address the labour market from a skills perspective, taking into consideration the fourth industrial revolution, the technology and the use of artificial intelligence
- Promote a more detailed and in-depth study of labour demand in domestic as well as in external labour markets in terms of
  - labour volume
  - future needs for jobs and skills,
  - develop a system for collecting information with a panel of companies capable of providing regular information to understand the dynamics of labour demand
  - The human resources of employment agencies must be improved

- The active labour market programmes need to be revised to avoid overlap and to address their main objectives which should be to develop human resources so as to meet demand for labour in both the domestic as well as external labour markets
- Several programmes target the same population and provide the same benefits.
- An evaluation of the effectiveness of these programmes is also needed to retain only those that are effective.
- The industrial and logistics infrastructure should be improved to meet international standards.
- This reduces regional disparities by attracting investors to the lagging regions of the country, leading to a reduction in unemployment.
- Development policies should account for regional and gender differences.

## D Data

Informed decisions and policymaking are based on the availability and the degree of accuracy of data. The following recommendations are related to data availability and data improvement:

- Need to strengthen the capacities of countries in terms of data collection and analysis of labour market issues by integrating new themes into employment surveys to improve knowledge and respond to the concerns and priorities of the new model of development.
- Reform employment surveys to meet the requirements of advanced regionalisation, the international framework of SDGs and the level of detail of information requested by the main data users as well as profound changes in economic structures, education and training as well as for the national labour market.
- Integrate the new recommendations of the 2018 International Conference on Labour Statistics regarding the measurement of labour, employment and underuse statistics into the census population and the employment national surveys.
- Administrative statistics on migration, work permits for foreigners, and the international placement of locals
- Better coordination between stakeholders is essential for sharing data and monitoring the trajectory of jobseekers.
- Improving the migration module in the different censuses and introduce regular national comprehensive surveys on population and employment.
- Carrying out periodical international migration surveys

## E Mismatch

Issues related to mismatch need more attention and practical solutions. Some suggestions to decrease mismatch are given below:

- Improve public support and mediation services in the field of employment by providing qualified human resources to welcome, direct and help certified young people to join the job market;
- Provide the infrastructure necessary for reception, such as the creation of new agencies and the circulation of mobile agencies across the different regions
- Encourage partnerships in the field of mediation between the public and private sectors to meet the needs of young people.
- The adoption of digitisation for communication and awareness (modern means of communication) to bring brokerage services closer to young people.

## F

## Migration

Migration governance needs to be enhanced in the countries under consideration. Suggestions to improve migration governance are given below:

- Migration governance through the development of services for migrants in order to provide information on the jobs available abroad and to develop training programmes to help migrants to find jobs abroad, and open up new international markets for nationals
- Countries are urged to address the root causes and drivers of migration and policies that promote safe and orderly mobility. This may be addressed through more cooperation on regular migration with regional partners as well as socioeconomic development efforts and mainstreaming migration into development planning
- Analyse the changing demographic structures of the world and their impact on the future of work and the future of skills in light of the demographic surplus in the countries under consideration and the demographic deficit in other countries in order to utilise mechanisms for demographic complementarities
- Expand and reconsider existing and new bilateral cooperation between the countries to better govern international migration for the benefit of migrants, source countries, as well as recipient countries
- Carry out research on future demand for migrant labour in external labour markets to formulate education and training policies aimed at meeting this demand without impairing the functioning of the labour markets of the four countries

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# Annexe 1: Labour market and migration data

## I. Data availability

### A Egypt

#### General population census

The 2017 census provides data on the population accounts currently living in Egypt at the time of the census, whether nationals or foreigners, and their distribution across the governorates, along with the demographic and social characteristics. The census data covers the distribution of the population by gender, age group, education level, marital status and access to technology.

#### Economic census

The 2018 census was carried out in accordance with the international scientific standards for statistics and by using tablets and the up-to-date methods of electronic data collection. The census covers the characteristics of private formal and informal enterprise institutions as well as SMEs and the results of the 2018 census are to be publicly announced soon.

#### Annual Statistics Bulletin

Produces demographic, social and economic annual data at governorate level. This bulletin is published on the CAPMAS website in September of every year.

#### Labour force surveys

In addition to the regular census, which provides nationwide statistics on demographic composition, education and employment, a quarterly survey collected by the Central Agency for Public Mobilization and Statistics (CAPMAS) is produced.

In this context, the CAPMAS conducts a “Quarterly Labour Force Survey” which includes data on the size of manpower and labour force (employed and unemployed) and their geographical distribution by characteristics.

By the end of each year, CAPMAS issues the annual aggregated labour force bulletin publication that includes the results of the quarterly survey rounds that represent the manpower and labour force characteristics during the year.

Starting with the January 2012 round, and following international recommendations to avoid asking extra questions that affect the precision and accuracy of the collected data, a shortened version of the questionnaire was designed to include the core questions that enable the obtaining of basic Egyptian labour market indicators.

The shortened version is collected in three rounds (January-March), (April-June), and (October-December) while the long version of the questionnaire is collected in the 4th round (July-September) and includes more information on housing conditions and immigration.

#### Other labour and wages statistics

CAPMAS produces a number of regular statistics bulletins covering important topics covering most of the labour and wages issues. These topics include:

- Workers in the government and public sectors
- Employment, ages and working hours
- Foreigners employed in the public sector
- Foreigners employed in the private and investments sector
- Egyptians with permits to work abroad, and Egyptians with dual nationality
- Work permits for Egyptians working abroad
- Work injuries

## Education statistics bulletin

CAPMAS produces annual statistics bulletins containing data on the education system. These statistics bulletins include:

- Annual bulletin for education and training in public and private institutions
- Annual bulletin for Egyptians abroad for educational purposes
- Pre-university education bulletin
- Annual bulletin for tertiary education enrolment and teachers
- Annual bulletin for university and postgraduate studies graduates

## HIMS

Egypt launched the MED-HIMS with the support of the IOM. The survey provides the different stakeholders dealing with international migration and mobility in Egypt with the relevant instruments to formulate, implement and evaluate migration policies and programmes in a cost-effective manner.

## Egyptian Labour Market Panel Survey (ELMPS)

With the cooperation of the Central Agency for Public Mobilization and Statistics (CAPMAS), ERF has successfully conducted four labour market panel surveys in Egypt (1998, 2006, 2012, and 2018).

The LMPS are designed as panel surveys in the sense that any households and individuals who were interviewed during previous rounds (if any) are interviewed again. Individuals who left the original households during the interviewing period are also tracked and interviewed together with their entire household. This panel design reflects the state of the art in data collection methodology in the labour field

The ELMPS with its four rounds is composed of two sections: a household survey and an individual survey. The household survey covers the current (at the time of the survey) basic demographic, social and economic characteristics of all the members of the household. These basic characteristics include age, gender, marital status, household wealth and asset ownership, residency, current employment status, highest level of education and a more recent addition since the 2012 round, information on members of the household who are currently living abroad.

The household survey includes a number of detailed modules on education, employment, unemployment, informality, entrepreneurship, family formation, health, civic and community participation. The last round has further added the households' mechanisms for coping with economic shocks.

## SYPE

In 2009 and 2014, Population Council conducted the ground-breaking *Survey of Young People in Egypt (SYPE)*. The Council interviewers spoke to a nationally representative sample of around 15,000 young people between the ages of 10 and 29 from 11,000 households - one of the largest ever surveys of young people in the Middle East and North Africa. Similar in structure to the ELMPS, SYPE reaches out to young people in the frontier governorates and slum areas in Egypt.

In 2014, the Council re-interviewed more than 10,000 respondents from the original 2009 survey, a group now aged 14–35. The results of these studies - which offered gender-disaggregated information on health, schooling, employment, civic engagement, and many other topics - have deep implications for government policies for young people and the development of post-Revolution Egypt. The data provides nuanced details about Egyptian youths' struggle for employment, their concerns about Egypt's economic situation, and their resilient optimism for the future.

## B Jordan

### Jordan Population and Housing Census

The Jordan Population and Housing Census is carried out every 10 years and covers employment, mortality, health insurance, education, and migration.

### Population and Family Health Survey

The key objective of this survey is to provide comprehensive data on fertility, mortality, family planning, and maternal and child health and nutrition as a tool for assessing existing population and health programmes and policies.

### Household Expenditure and Income Survey

This regular survey accounts for the continuous changes in spending patterns, income levels and prices, as well as in the population's internal and external migration. The survey was conducted to achieve the following objectives: provide data on income and expenditure, reflect the relative importance of consumer expenditure items used in the preparation of the consumer price index, provide data related to overall consumption and income of the household sector, provide data on economic and social development programmes, identify consumer spending patterns prevailing in society, and the impact of demographic, social and economic variables on those patterns, calculate the average annual income of the household and the individual, and identify the relationship between income and different socioeconomic factors, and study the distribution of individuals and households by income and expenditure category.

### Higher Education and Graduates Survey

The Higher Education Graduates Survey (HEGS) was carried out in Jordan during 2012. It covers a random sample of university graduates aged 25–40 years from selected disciplines, namely accounting, administration, and computer sciences, who graduated during the fifteen years preceding the survey. The survey collects information on graduates' socioeconomic background, household characteristics, education experience, job experience and employment history and mobility. It also provides data on students' feedback and monitoring in both private and public institutions, labour market outcomes for graduates of these institutions and retrospective data on graduates' learning experience.

### Jordanian Labour Market Panel Survey

The JLMPS provides an in-depth assessment of critical social and economic developments in Jordan's recent history. The topics covered by the survey include demographic and work characteristics, the characteristics of employment, unemployment, and underemployment, labour mobility, the family enterprise (to study the characteristics of informal sector employment), women's work, health, information technology, savings and borrowing, gender attitudes, and earnings. New modules were added in 2016 to the questionnaire to collect data about the in-migration of non-Jordanians, food security, and household exposure to shocks and coping strategies.

### Employment and Unemployment Survey

The Department of Statistics (DOS) carried out four rounds of the 2016 Employment and Unemployment Survey covering a sample of about 49,000 households nationwide. Data was collected using an electronic questionnaire instead of a hard copy.

The main topics covered by the survey:

- The demographic, social and economic characteristics of the population and manpower.
- The employment status, occupational structure and economic activity of employed persons and reasons for potential turnover
- Participation in economic activity and unemployment rates and the characteristics of unemployed persons. Most important ways to get a job.

### Syrian Refugee Health Access Survey in Jordan

The objective of this national assessment of access to healthcare by Syrian refugees in Jordan was to characterise the health status and care-seeking behaviours of Syrian refugees living outside of camps and to provide information regarding issues related to their access to healthcare. The survey sample was nationally representative of Syrians in Jordan.

### National Youth Survey

The objective of the survey is to identify and update data on the status of Jordanian youth (aged 10–24) by assessing their situation, priorities, and aspirations. The survey's results were intended to support the Jordanian National Youth Strategy. The survey covered the following topics: education, employment, health, time usage, civil and political engagement, access to information and technology, social relationships, self-perception, immigration and migration.

### Jordan Enterprise Survey

This survey focuses on many factors that shape the business environment. These factors could be ones that encourage firms to operate efficiently or ones that increase obstacles to conducting business activities and decrease a country's prospects for reaching its potential in terms of employment, production and welfare.

### Jordan National Child Labour Survey

A survey supported by the ILO. This survey's estimates incorporate the guidelines and statistical measurement standards regarding child labour and relevant statistics on working children as contained in the resolution concerning child labour statistics. The initial survey covered children aged 5–17 years.

## C

# Morocco

### General Census of Population and Housing (RGPH)

The 2014 census provides data on, among other things, immigrants and foreigners residing in Morocco as well as their demographic and socioeconomic profiles including the characteristics relating to their employment (type of activity, profession, situation in the profession, activity sector)

### National Survey on Employment

The National Employment Survey (ENE) underwent a reform from 2017 to provide, in addition to general data on the labour market of nationals, data on new topics such as the demographic and socioeconomic characteristics of immigrants in Morocco, their access to training and employment, women's access to the labour market, the characteristics of immigrant entrepreneurs, the coverage of pension systems, medical coverage, the use of new information technologies and communication, employment pools and the mobility of active workers between their places of residence and work.

### Other specific household surveys on international migration

- Survey on International Migration in Morocco (MED-HIMS Morocco) (HCP 2018);
- Investigation by the Konrad Adenauer Stiftung, "Sub-Saharan migrants in Morocco: Challenges of residential migration", 2015–2016
- National survey on the impact of international migration on development in Morocco (AMI, 2015).
- The socioeconomic surveys of Moroccans living abroad in 2000 and 2005, National Institute of Statistics and Applied Economics.
- Surveys on sub-Saharan immigration to Morocco (2008).
- Survey on Migration and Skills, 2012 (in collaboration with the ETF in Morocco): This survey attempted to analyse the skill composition of potential and return migrants, thereby leading to studies at a

micro level, and creating a migrant profile in Morocco. The field survey focuses on education and skills levels as well as the employment situation of potential and return migrants before, during and after the migration process.

- National Survey on Household Living Standards (ENVM). The Statistics Department of the HCP undertook a household survey in 2006–2007 on the standard of living of households. Modules on international migration (emigrants and return migrants) and on transfers have been integrated.

### Sources of administrative statistics on international migration and the labour market:

- Ministry of Work and Professional Integration.
- Ministry of Foreign Affairs, African Cooperation and Moroccans Residing Abroad.
- Minister Delegate in Charge of Moroccans Residing Abroad and Migration Affairs, Report on the "National Immigration and Asylum Policy 2013–2016".
- National Agency for the Promotion of Jobs and Skills (international and national placements).
- Work permits/Ministry of Employment.
- Residence permits/Ministry of the Interior.
- Irregular migration statistics, regularisations and interception statistics/Ministry of the Interior.
- National Social Security Fund (CNSS).

Private employment agencies provide data on jobseeker registrations, mediation, industries, demographic and socioeconomic profiles of job seekers and placements (including emigrants and immigrants) as well than those of the companies concerned, both nationally and internationally.

## D

# Tunisia

1. The General Census of Population and Housing
2. The Population and Employment Survey - ENPE
3. The Employment and Wages Survey
4. The Survey of Economic Activities
5. The National Business Register
6. The Microenterprise Survey

# II.

## Data quality

### A

## Egypt

Data availability is considered Egypt's main weakness when it comes to labour market and migration planning, management and policymaking. Diversified sources of data exist with a limitation in the ability to generalise and account for a full general trend across the country.

While much has been written on the evolution of labour supply, there has been limited research on labour demand, primarily due to limited publicly available data on firms. Data that allows for an investigation into job growth has been particularly scarce.

### Main strengths and weaknesses

A great deal of attention is currently focused on the availability and quality of data produced. This focus has been translated into updated survey and data collection techniques, as well as improving access to the data available. In spite of that, no consensus has been reached on its definition for the informal sector. Secondly, data gathering regarding the informal sector is very difficult since those engaged in such activities are not seeking recognition.

The reference to the mismatch between education outcomes and the labour market's needs generally refers to the general educational outcomes. Vocational education is lacking the data that allows an estimate of the extent to which the current TVET provision meets labour market demands. This does not allow for the analysis of the extent to which this mismatch is present and affecting the labour market for young people.

Other separate issues exist with regards to data availability and quality in Egypt, among which are:

1. The data produced is highly insensitive to gender (no gender-specific tools)
2. The informal sector is not widely covered
3. More data for vocational education is needed
4. Data is more focused on labour supply rather than demand

### B

## Jordan

The data collected by the DoS was assessed and evaluated based on the European Statistics Code of Practice.

### Main strength and weaknesses

- Jordan now complies with IMFs SDDS requirements for data and metadata.
- All IT work in DoS is performed centrally (and inhouse), although there is also close contact between specific programmers and specific survey divisions enabling good understanding of user needs and current maintenance when new requirements (e.g. new variables/questions/fields) occur.
- A lack of clear strategic direction
- DoS metadata systems lack full coverage of all surveys/indicators, current systems are not really integrated with dissemination platforms
- Perceptions about which metadata is needed (scope and detail) and how the needs could be met for different purposes vary in DoS. This needs to be addressed before the preparation of a new metadata strategy.

## C

## Morocco

The mode of evaluation of labour market data uses the International Monetary Fund (IMF) framework and the requirements of the Directive of the 20th International Conference of Labour Statisticians of the ILO from 2018.

#### Main strengths and weaknesses

The census provides data on the labour market (employment, activity, unemployment, occupation and status in the occupation) at all geographic levels, even the most refined. Unfortunately, its results are not comparable to those of the National Employment Survey due to the difference in the collection methodology.

The National Employment Survey also provides data on the labour market of immigrants settled in Morocco. However, the numbers of immigrants obtained are not reliable because the extrapolation coefficients used by the employment survey are not adequate for estimating these numbers.

Administrative statistics on migration, work permits for foreigners in Morocco, placement of Moroccans abroad and immigrants in Morocco are not exhaustive and require the harmonisation of concepts and definitions to comply with recognised standards at an international level.

## D

## Tunisia

The evaluation of labour market statistics is part of an overall evaluation carried out by Tunisia after 2011. Tunisia's experience in reforming its National Statistical System (SNS) began in 1999 with the promulgation of Act No. 99-32 of 13 April 1999 on the SNS and the publication of a number of implementing decrees. In order to carry out this reform successfully, an overall evaluation was carried out in 2014 in the framework of cooperation with Eurostat (Zgoulli 2019).<sup>53</sup> This evaluation concluded that although the Tunisian statistical system had solid foundations, a thorough revision of the legislative framework was necessary to achieve the three essential objectives of efficiency, quality and respect of fundamental principles.

In order to initiate the process of revising, a twinning project on the “modernisation of the Tunisian statistical system” was launched in 2016 (until 2018) within the framework of the Support Programme to the Association Agreement and to Transition (P3AT). The Tunisian National Institute of Statistics is part of this twinning project, in partnership with the French National Institute of Statistics and Economic Studies (INSEE), the Italian Institute of Statistics (Istat) and Statistics of Lithuania. The twinning project aims to establish a coherent, efficient and permanent public statistical information system through two specific objectives: i) proposing a legislative and institutional framework conducive to better governance in the field of official statistics that would fully and effectively play its role, and ii) consolidating the role of the National Institute of Statistics as the main participant in the SNS.

Some work was initiated during the twinning project by introducing the certification of the National Institutes of Statistics' quality management system in accordance with ISO 9001. It was agreed to set up a quality unit and to choose two pilots: a survey (the employment and wage survey) and an administrative source (the National Business Register). A quality management system was set up and mapping of the processes of the employment and wage survey was carried out.

In addition, the Labour Force Survey (LFS) was evaluated by EUROSTAT (using a sector review tool) in order “to assess the administrative and technical capacity of the statistical systems to produce high-quality statistics in the sector reviewed, to assess the statistical production in the sector reviewed vis à-vis the EU acquis, and

to propose actions to improve and strengthen the statistical system”.<sup>54</sup> This evaluation supports the National Institute of Statistics in their efforts to align the Labour Force Survey with EU principles (European Statistics Code of Practice) and international standards (ILO recommendations).

#### Main strengths and weaknesses

The main strength and weaknesses of the Tunisian labour market statistics are based on the two evaluations mentioned above.

The National Institute of Statistics website is easily accessible. The user can use any of the following three languages: Arabic, French and English (but documents are normally available in Arabic and French only). By using the new BETA platform,<sup>55</sup> the user can easily make cross tables (an annual publication with approximately 30 tables on the labour force, employment and unemployment by gender, age, governorate and level of education), figures and maps that can be exported in different forms. Access to individual data for all variables remains limited.

The Department of Employment Statistics is responsible for the design, implementation and analysis of the LFS. According to Bastelaer and Ferrieri (2015), the team of statisticians at this department is highly skilled, particularly with regard to the conceptual framework of the LFS, but specific knowledge and experience in sample design techniques and statistical estimation is needed. Several important variables are missing in the Tunisian LFS compared to the EU LFS. The survey lacks variables to identify labour market segments, time-related underemployment, the month and year when people started their current job, the month and year when people left their last job, and a background variable on the nationality and the number of years of residence in Tunisia (Bastelaer and Ferrieri 2015).

Data on informal employment remains a challenge for the National Statistical System. Indeed, the microenterprise survey (conducted every five years by the INS) covering enterprises with less than 6 employees is used to evaluate the size of the informal sector for its registered part. However, the National Register of Enterprises, which serves as the sampling framework for the microenterprise survey, does not cover all private sector companies in Tunisia (many unregistered production units are not taken into account in the directory).

Migration statistics come from several ministries and agencies. It is necessary to consolidate these figures in order for the information to be reliable.

53 Zgoulli, M. (2019) La réforme juridique de l'activité statistique en Tunisie, *Statéco* no. 113, 2019.

54 Bastelaer, A.V., and Ferrieri, G. (2015) Report on the Sector Review of the Labour Force Survey in Tunisia.  
55 <http://beta.ins.tn>.

# III. Institutions collecting data

## A

### Egypt

1. **The Central Agency for Public Mobilization and Statistics (CAPMAS)**  
CAPMAS is the main institution for data collection and statistics in Egypt. It regularly publishes news, reports and surveys concerning the social, economic and demographic characteristics of the population of Egypt
2. **International Labor Organization (ILO)**  
The ILO provides an extensive database of macroeconomic and demographic indicators in Egypt, education, and immigration and emigration. Furthermore, it publishes a number of regular reports.
3. **World Bank:**  
The World Bank provides an extensive database of macroeconomic and demographic indicators in Egypt. Furthermore, it publishes a number of regular reports.
4. **Economic Research Forum (ERF)**  
The ERF provides an extensive database of surveys and reports on the Egyptian labour market and migration trends conducted mainly by CAPMAS, as well as issues of its own Egyptian Labor Market Panel Survey, published in 1998, 2006, 2012 and 2018. It also compiles and publishes the findings of the Labour Sample Survey conducted by CAPMAS.
5. **United Nations Statistics Division:**  
The UNSD provides a range of labour market, education and migration statistics on Egypt.
6. **International Monetary Fund (IMF)**  
The IMF provides an extensive database of macroeconomic and demographic indicators in Egypt. Furthermore, it publishes a number of regular reports.

## B

### Jordan

1. **Jordanian Department of Statistics**  
The Jordanian Department of Statistics (DoS) is the main institution for data collection and statistics in Jordan. It regularly publishes news, reports and surveys concerning the labour market and migration trends in Jordan.
2. **International Labor Organization (ILO)**  
The ILO provides an extensive database of macroeconomic and demographic indicators in Jordan, and on education, immigration and emigration. Furthermore, it publishes a number of regular reports.
3. **World Bank:**  
The World Bank provides an extensive database of macroeconomic and demographic indicators in Jordan, and on education, immigration and emigration. Furthermore, it publishes a number of regular reports.
4. **Economic Research Forum (ERF)**  
The ERF provides an extensive database of surveys and reports on Jordanian labor market and migration trends conducted by various institutions, as well as two issues of its own Jordanian Labor Market Panel Survey, published in 2010 and 2016. It also compiles and publishes the findings of the Employment and Unemployment Survey conducted by the Department of Statistics.
5. **United Nations Statistics Division:**  
The UNSD provides a range of labour market, education and migration statistics on Jordan.
6. **International Monetary Fund (IMF)**  
The IMF provides an extensive database of macroeconomic and demographic indicators in Jordan, and on education, immigration and emigration. Furthermore, it publishes a number of regular reports which will be listed below.

#### 7. Census and Economic Information Center (CEIC)

The CEIC provides an extensive database of demographics, macroeconomic indicators, migration and education in Jordan. The main source for the data compiled and provided by the CEIC is the World Bank.

#### 8. Organisation of Islamic Cooperation (OIC)

The OIC provides an extensive database of labour, demographics, and migration patterns in Jordan. The main source of data compiled and provided by the OIC is the Jordan Department of Statistics.

#### 9. Organisation for Economic Co-operation and Development

The OECD provides a wide range of resources on labour market policies and youth employment/unemployment in Jordan.

## C

### Morocco

Data on the labour market and migration:

- Higher Planning Commission, Statistics Directorate.
- The Ministry of Foreign Affairs and Cooperation
- The Ministry Delegate responsible for Moroccans Residing Abroad and Migration Affairs
- The Ministry of the Interior

Data on work permits and placement in Morocco and abroad

- Ministry of Labour and Professional Integration

Data on education

- Ministry of Education

Data on vocational training

- Office for Vocational Training and Promotion of Work (ONFPPT)

## D

### Tunisia

Act no. 99-32 of 13 April 1999 on the National Statistical System (SNS) governs the basic activities related to the production of official statistics at national and local level. The SNS includes the National Council on Statistics (CNS), the National Statistics Institute (INS), the specialised public statistics units, and the statistical training institutions (such as the Higher School of Statistics and Information Analysis).<sup>56</sup> The CNS ensures the institutional coordination and planning of statistical activities. The INS, as the central executive body of the SNS, provides the technical coordination of statistical activities including the publication and dissemination of statistical information to all public and private users as well as the cooperation between data producers and data users by respecting the confidential character of the data established by the Act.

Several ministries and institutions are involved with the Tunisian labour market. On the public sector, the main sources are the National Institute of Statistics (INS), the Ministry of Employment and Vocational Training (MFPE), the Ministry of the Civil Service, the Ministry of Social Affairs, the Ministry of Higher Education and the Ministry of Finance, amongst others. Below is a short description of these sources:<sup>57</sup>

- The National Institute of Statistics (INS): The INS was created in 1969 by Act No. 69-64 of 31 December 1969. It is a non-administrative public institution under the supervision of the Ministry of Development, Investment and International Cooperation (MDiCI). Ministry of Employment and Vocational Training (MFPE): The MFPE produces statistics on the labour market through their agen-

cies, offices and training centres, such as the ANETI (labour supply and demand, labour market policies), ATFP (statistics on the beneficiaries of initial vocational training), CNFPP (statistics on the beneficiaries of continuing training), ONEQ (School-to-Work Transition Survey, 2013–2014, the Tunisia Graduate Tracer Survey for the years 2004 and 2008), and training centres (throughout the country).

- Ministry of the Civil Service: By using the state administrative and financial personnel system (INSAF system), the Ministry of the Civil Service ensures the integrated management of staff numbers and salaries in public services.
- Ministry of Social Affairs (MAS): It manages a number of administrative databases with a rich supply of information through the Caisse Nationale de Sécurité Sociale (CNSS) which manages the database of private sector employees, the Caisse Nationale de la Retraite et de la Prévoyance Sociale (CNRPS) and the National Programme of Assistance to Needy Families (PNAFN). In addition, two surveys (on wage structure in Tunisia and needy families) were carried out by the Consortium for Economic and Social Research (CRES).
- Ministry of Higher Education: Data on the graduates of higher education (public/private). This database allows us to estimate, each year, the number of new entrants into the labour market with higher education degrees.
- Tunisian Agency for Technical Cooperation (ATCT).

Some private agencies are involved with the Tunisian labour market, such as i) ADECCO: the Adecco Group is committed to the promotion of stable employment and the hiring of vulnerable people, in particular through temporary work placements, but also fixed-term and permanent contracts, ii) MANPOWER, and iii) CRIT.

<sup>56</sup> International Monetary Fund (IMF) Country Report No. 06/300.

<sup>57</sup> IACE (2016) Système d'Information sur le Marché de Travail en Tunisie (SIMT), Forum SIMT : Renforcer la collaboration entre services et données.

# IV. Type of data collected

## A

## Egypt

### Job seekers

- Labour Force Survey conducted by CAPMAS and published by the ERF
- Labour and wages statistics bullet published by CAPMAS
- ELMPS by the ERF
- SYPE by the Population Council

### Education (vocational)

- Educational statistical bulletin published by CAPMAS
- ELMPS by the ERF
- SYPE by the Population Council

### Skill profiles

- Labour Force Survey conducted by CAPMAS and published by the ERF
- ELMPS by the ERF
- SYPE by the Population Council

### Job experience

- Labour Force Survey conducted by CAPMAS and published by the ERF
- ELMPS by the ERF
- SYPE by the Population Council

## B

## Jordan

### Job seekers

- The Employment and Unemployment Survey conducted by the Department of Statistics and published by the ERF
- Jordan's National Employment Strategy 2011–2020

### Education (vocational)

- Jordan's National Employment Strategy 2011–2020
- ETF Report on Technical and Vocational Education and Training in Jordan -Areas for Development Cooperation 2006
- ILO Manual on Skills Testing and Certification in Jordan 2015:
- UNESCO:
- UN Statistics Division (UNSD)

### Skill profiles

- Jordan's National Employment Strategy 2011–2020
- Department of Statistics database, tables of employment and unemployment

### Job experience

- Department of Statistics database, tables of employment and unemployment

### Vacant job positions and skill profiles for vacant positions

- World Bank Enterprise Surveys:
- Jordan's National Employment Strategy 2011–2020

## C

## Morocco

## Job seekers

- Number of population unemployed
- Active population unemployed according to the type of unemployed
- Active population unemployed according to the duration of unemployment
- Rate of feminisation of the unemployed population
- Unemployment rate
- Unemployment rate by region
- Unemployment rate by gender
- Unemployment rate by place of residence
- Unemployment rate by age
- Unemployment rate by diploma
- Unemployment rate of immigrant
- Unemployment rate of immigrants by gender
- Unemployment rate of immigrants by age
- Unemployment rate of immigrants by nationality
- Unemployment rate of immigrants by diploma

## Education (vocational)

- The distribution of the population by level of education, gender, place of residence and age.
- The distribution of the population by diploma, gender, place of residence and age;
- The illiteracy rate of the population aged 10 and over by gender, place of residence and age group.
- Registrations, numbers of students and graduates of public and private universities, of executive training and vocational training, depending on the type of training, field of study, speciality, gender etc.
- Distribution of professional training needs by region.
- Potential new entrants into the labour market from higher education and vocational training graduates.

## Skill profiles

- Skills profiles by age, gender, diploma, professional experience, integration, size of company, sector of activity etc.,
- Data on enrolments, numbers of students and graduates of public universities, those lacking managerial training and professional training, depending on the type of training, field of study, speciality, gender etc.
- Distribution of vocational training graduates by training operator.
- Distribution of vocational training graduates by level of training.
- Distribution of vocational training graduates by training sector
- Requirements in qualified profiles without diploma requirement by region.
- Level of education and monitoring of vocational training by migrants
- Adequacy of training/employment of employed and unemployed working immigrants.

## Job experience

- Education, vocational and employment;
- The use of new information and communications technologies;
- The characteristics of entrepreneurs;

## Vacant job positions and skill profiles of vacant positions

- Distribution of beneficiaries of the international placements by sector of activity.
- Distribution of beneficiaries of international placement by host country.
- Distribution of Moroccan migrant workers by type of contract.
- Contracts targeted at foreign employees by business sector.
- Contracts targeted at foreign employees by nationality.
- Recruitment needs by region of activity
- Recruitment needs by sector
- Forecast needs by profile

- ANAPEC services
- Job offers collected
- Number of people trained for the benefit of emerging sectors
- Number of project leaders supported

## D

## Tunisia

The General Census of Population and Housing provides a wide range of information including educational attainment, labour activities, housing conditions and maternity history. In addition, it contains two modules on migration: the first one focused on mobility, internal migration and immigration, and the second one focused on international emigration. The census data is considered to be the main source of information on migration in Tunisia.

The ENPE survey tracks employment and unemployment indicators at national and regional level such as unemployment rate, additional employment demands and job creation. Later in 2011, the INS started to conduct the ENPE quarterly. The survey covers the following modalities: demographic characteristics (age group, marital status, etc.), educational characteristics (level of education, illiteracy rate, etc.), labour force characteristics (participation rate and the number of employees), unemployment characteristics (unemployment rate, unemployment duration, etc.) and indicators concerning household living standards. The ENPE uses the unemployment definition and concepts adopted by the International Labor Organization (ILO). According to the ILO definition, an individual is considered to be unemployed if he/she has not worked during the week preceding the day of the interview, was looking for a job in the month preceding the date of the interview, and is available to work within two weeks after the day of interview. The survey also aims to estimate some indicators on internal and external migration.

ANETI has an effective management information system, which can be accessed at any time from any office.

The National Observatory of Employment and Qualification (ONEQ) is a component of the National Statistics System and a decision-making support tool in the field of employment and qualifications. The main task of the ONEQ is to develop an information system for the labour market, to perform analyses on employment and qualifications and to disseminate these results. It collects information on the labour market at national, regional and sectoral levels. ONEQ also conducts surveys for designing and developing employment databases and for evaluating programmes and tools used to place jobseekers.

The TLMPS is an important publicly accessible database on the labour market and migration in Tunisia conducted in partnership between the Economic Research Forum (ERF) and the INS. It is one of the same series of surveys conducted in other MENA countries such as the Egypt Labour Market Panel Surveys (ELMPSs) of 1998, 2006, 2012 and 2018 and the Jordan Labour Market Surveys (JLMPSs) of 2010 and 2016 (see Assaad et al. 2016 for more details). The TLMPS 2014 is a nationally representative survey that covers 16,200 individuals, in over 4,600 households. The survey enables in-depth analysis based on households and individual information, especially in regard to labour market characteristics. It has been used in numerous academic publications, dissertations, and international organisation reports (see, amongst others, Assaad and Krafft 2016, Assaad et al. 2016, Assaad and Boughzala 2018, Hanmer et al. 2017, David and Marouani 2017, Amara et al. 2018, Krafft et al. 2019, Krafft et al. Alawode 2018, Assaad et al. 2019).

# V. Type of regular reports available from labour market authorities

A

## Egypt

- Quarterly and annual labour force survey (CAPMAS)
- Annual statistics bulletin (CAPMAS)
- Regular (every 10 years) Population Census

B

## Jordan

- Employment and unemployment survey
- Household expenditure and income survey

C

## Morocco

- Annual and quarterly report on the labor market, produced by the Higher Planning Commission on the basis of the National Employment Survey
- “Annual report on the Labour Market”, prepared by the Directorate of the National Labour Market Observatory, Ministry of Labour and professional integration.
- Report on the “Annual review of the activities of the National Agency for the Promotion of Employment and Skills (ANAPEC)”

D

## Tunisia

- The National Institute of Statistics publishes an annual report that contains the detailed results of the National Survey on Population and Employment. The report has four sections. The first two sections present the demographic and educational characteristics of the population. Section three presents the economic characteristics of the population (active, employed and unemployed), and the last section presents the living conditions of households.
- The annual report on the labour market in Tunisia published by the ONEQ: the ONEQ report presents and analyses all information and indicators concerning the Tunisian labour market. The first version of this report is dated 2013. In addition, the ONEQ publishes the “Employment Statistics” (annual publication). This report aims to present a working tool for the various users seeking to better understand and analyse the functioning of the labour market. It provides a synthesis over several years of the main indicators of this market calculated from various sources. Four areas of indicators are covered by this document: i) The areas of activity, employment and unemployment; ii) the characteristics of employment at the firm; iii) the labour market covered by the ANETI, and iv) the employee incentive programmes.
- Vocational training in figures: prepared and published by the ONEQ since 2009 - provides annual statistical information on the national vocational training system based on data from various public and private vocational training structures.
- The ANETI annual report: provides information on labour demand, labour supply, placement, as well as information on the active labour market programmes.
- The IACE National Employment Report: IACE published its fourth national employment report in 2019. The report presents a deep analysis of labour supply and demand matching processes in Tunisia. It focuses on firms' needs in terms of skilled human capital.

# Annexe 2: The educational system in Egypt, Jordan, Morocco and Tunisia

## I. Egypt

### A

## General education

The public education system in Egypt is composed of three levels: nine years of basic education (six years of primary and three years of preparatory), secondary school (general and vocational) and tertiary level. At the preparatory level of education, students have the option of going into general preparatory (97 percent of students choose this option) or vocational preparatory which is also a three year programme. After completing the vocational preparatory level, students can either enter the labour market or start a three-year course at vocational secondary level. Those finishing the general preparatory levels can either join a general secondary schools or a technical secondary school.

Students finishing a general secondary school course, which lasts for three years, either enter labour market (a very small proportion) or join a higher education institution (either a vocational training institute or university). Instead of a general secondary school, students can join a technical secondary school which takes place at two levels. The first level prepares technicians in a three-year programme. The second prepares senior technicians in a five-year programme. Both levels prepare the students to later join higher education, depending on their test scores. However, the vast majority of this level's graduates prefer to join the labour market straight away.

The highest level of education takes place at universities, institutes or technical colleges. The duration of study at these institutions varies from 2 years (middle technical institutes) to 4/5/6 years at universities and higher institutes. In addition to the public higher education institutions, 17 private universities and 141 private institutes exist at national level.

Parallel to this public education system, there is the Al-Azharite education system which follows the same levels and standards but with a more rigorous religious structure to the curriculum. The share of Al-Azharite education at primary level is extensive, but declines at the higher levels of education.

### B

## Vocational and technical education and training (TVET)

Post-secondary vocational education and training serves five main sectors: engineering (industrial), commercial, tourism and hotel services, medical and social work. Within these five sectors, approximately 108 different technical programmes exist in 22 disciplines.

There are now eight technical colleges in Egypt, after combining with 45 middle technical institutes in 2002. These eight technical college are the largest providers of post-secondary vocational education and training in Egypt. Two of these colleges are located in Cairo, with the remainder in Quesna, Great Mahalla, Alexandria, Port-Said, Middle off the Valley and South of the Valley. In addition to these technical colleges, Table A2.1 below shows the diversity of vocational education and training institutes in the fields of technical health, technical nursing and technology competence at private technical institutes and the Egypt Trade Union Federation Worker's University with its two divisions: technological development and industrial relations. Also on offer is the integrated technical education cluster and the industrial education colleges which offer four-year programmes that lead to a Bachelor of Industrial Education degree.

Table A2.1: Post-secondary vocational education and training disciplines in Egypt

| Sectors                      | Disciplines  |
|------------------------------|--|
| Commercial                   | Management and operation of small projects<br>Taxation and social insurance<br>Financial and social insurance<br>Financial institution calculation<br>Marketing and storage management<br>Executive secretarial studies<br>Information technology<br>Management of ports and customs<br>Science of law |
| Social work                  | Social work  |
| Tourism and hotel management | Tourism<br>Hotel services  |
| Engineering or industrial    | Electrical engineering skills<br>Computers and information technology<br>Automotive<br>Mechanical engineering skills<br>Architecture<br>Garments, fabrics and weaving<br>Health and biological industries  |
| Medical                      | Health technician<br>Medical services<br>Nursing   |

Table A2.2: Basic indicators of vocational education and training (2009/10)

| Institute   | Public/private | Number of institutes | Number of enrolled students | Proportion of total enrolment in post-secondary VET institutes |
|---|----------------|----------------------|-----------------------------|--|
| Technical colleges  | Public         | 8                    | 73,952                      | 58.03  |
| Technical health institutes   | Public         | 12                   | 16,678                      | 13.09  |
| Technical nursing institutes  | Public         | 17                   | 2,565                       | 2.01   |
| Private middle institutes   | Private        | 13                   | 1,868                       | 10.88  |
| Workers' University   | Private        | 11                   | 13,406                      | 10.52  |
| Integrated technical education cluster                                      | Private        | 1                    | 227                         | 0.18   |
| Faculties of industrial education   | Public         | 4                    | 6,467                       | 5.07   |
| Technical institutes for developed industries/technology competency centres | Public         | 2                    | 277                         | 0.22   |
| <b>Total</b>  |                | <b>68</b>            | <b>127,440</b>              | <b>100</b>   |

Training through industry attachments (dual systems and apprenticeships), in-service training and the retraining the people already in the labour force (employed and unemployed). These training systems are offered formally and informally as well as through private or government institutions (World Bank, 2003).

Tracking in-service training in the private sector is difficult. It has been estimated by the Social Fund for Development that there are 46 in-service training centres in the private sector. This number is an approximation to what we know. However, the number does not reflect the reality due to the existence of other private sector training centres that are not accounted for.

Among the examples of the private sector training institutions is the Sewedy Technical Academy (STA). Under the supervision of the Ministry of Education and Technical Education, ElSewedy Development has established the Sewedy Technical Academy which provides three-year secondary level programmes offering customised technical education for the major electrical industries in accordance with international standards. The training programme combines learning and training courses at schools and within factories. This combination of learning and on-the-job-training empowers students with the necessary knowledge, skills and attitudes.

Other examples include employer-led employment training programmes (ETPs) that aim to advance the skills of the specific sector at local level. Twelve sector-based ETPs exist as well as 15 local ETPs across the governorates of Egypt. Moreover, sector-specific vocational training centres exist providing training for approximately half a million trainees annually at over 800 centres that are managed by the different affiliated sectoral ministries. Of these centres, 600 are public and operated directly by the affiliated ministry.

Community-based centres run by local NGOs provide short non-formal courses for disadvantaged groups, mainly women, disabled people and unemployed young people. These centres are heavily subsidised by the government. Privately owned or managed TVET providers are rather limited and highly specialised and are mainly hosted by the private sector companies as in-house training units. These centres have a limited number of students per class and are able to maintain a high quality of instruction and strong links with employers.

Other non-state TVET providers include Don Bosco, El Gouna Hotel School, the National Academy for Science and skills (NASS), the German Egyptian Welding Center, Hedo Welding Academy, General Motors Academy, the Masr El Kheir Foundation, the Sawiris Social Development Foundation, the Egyptian Hope Bank, the Egyptian Business Development Association and the TAMKEEN Project. Most of these training centres and academies are formed jointly between a local private sector institution and an international NGO partner.

# II. Jordan

Joining secondary education, academic or vocational, in Jordan is very dependent on the grades achieved in basic education. Options to move from one system to the other are very limited.

### **The public sector institutions**

The public sector provision of technical and vocational training and education consists of four segments pursuing their own policy priorities and causing a great deal of duplications, incompatibility and centralisation of decision making. This centralisation of decision making includes the purchase of equipment and changing the teaching content.

Initially, community colleges were set up to provide a technically skilled workforce to the labour market, but over time these colleges started to offer academic courses that allow students who have failed to directly qualify for university to gain access to a university programme. This change in mandate for the community colleges has led to the limited supply of middle- and low-level skills to the labour market.

Secondary vocational education is provided by the Ministry of Education through centres in public schools. Students in this system can specialise in one of four main fields: industry, agriculture, home economics or hotel management and tourism.

The vocational training corporations represent the smallest sector of vocational education and training. The students enrolled are the ones who have failed in the public vocational schooling system. The vocational training corporations have a good infrastructure and geographical coverage, however they suffer from poor responsiveness to labour market demand and fails to attract high-quality instructors.

Finally, there is the National Employment and Training Company, which is run by the Jordanian Armed Forces. It has the highest cost per trainee and the highest cost per graduate when compared to all other TVET programmes. This inflated cost is mainly due to the incentives offered to the trainees. These incentives include lodging for six months, meals, transportation, wages, social security and health insurance for the duration of a one-year course. Despite this high cost, employers have generally not been satisfied with the graduates from the programme, who turn out to have a poor work ethic and a reluctance to obtain private sector employment and therefore end up in jobs that do not match their training.

### **Private institutions**

Private training institutions also exist across the country. These include private and non-government training provision, consisting mainly of private community colleges, for-profit non-formal training and NGO training as well as enterprise-based training. The contribution of private training to the informal economy is rather limited. The private training programmes include secretarial, computer and office skills. Entrepreneurial and managerial skills are rather limited in the private training programmes. This does not quite match the government approach of increasing small-sized economic activities.

The government of Jordan has identified the significance of TVET as a contributor to the Jordanian labour market problems, and the Government of Jordan has decided to put in place a process to restructure the TVET system. This restructuring has started with the recent establishment of a number of development pillars with regards to education in the kingdom. These developments involve the introduction of assessment techniques and instruments as well as coordination between the different efforts for the provision of early childhood education. These efforts have combined the measures of different stakeholders, involving the Ministry of Education, the National Centre of Human Resource Development, the Queen Rania Training Academy, the Madrasti Initiative and the Curricula and Assessment Centre.

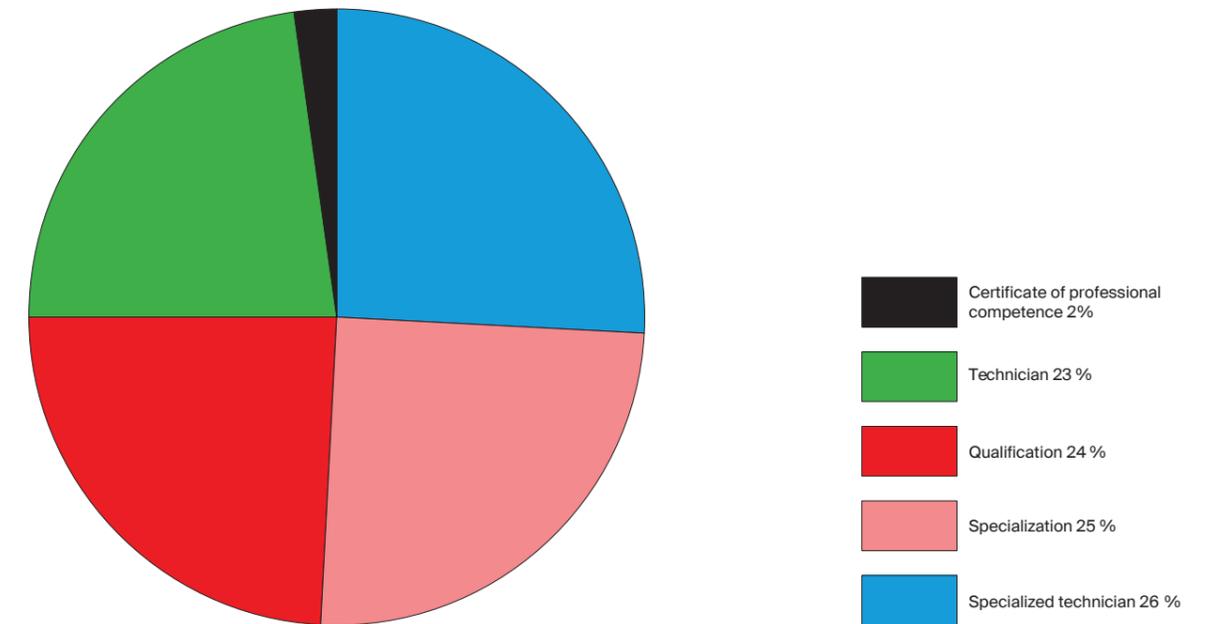
### **TVET policies**

From understanding the importance of developing an advanced TVET system and the need for a qualified workforce in the different fields of the labour market, an emphasis on TVET education has arisen in a number of Jordanian strategies, such as the Jordan Vision 2025, the National Employment Strategy and the National Strategy for Human Resource Development (2016–2025). These strategies focus on the sectoral coordination of vocational education between the relevant ministries, the national sectors and national operational needs. TVET education is still perceived as a second class education route among students, who prefer to join universities and later acquire a public sector career.

# III. Morocco

The workforce of vocational training graduates is almost evenly divided between specialised technicians, technicians qualification and specialisation levels. Unlike the other levels, CAP graduates record the lowest rate with only 2% in 2016–2017. This distribution remains broadly similar to that of the graduates of 2016.

Figure A2.3: **Distribution of vocational training graduates by level of training in 2017**



Source: Ministry of Labour and Professional Integration, the job market in 2018

## A Vocational training at schools

### Types and numbers of schools

The professional training offered by the Office of Professional Training and Work Promotion (OFPPT) includes more than 340 courses covering all training sectors and organised into residential, alternating and apprenticeship training.

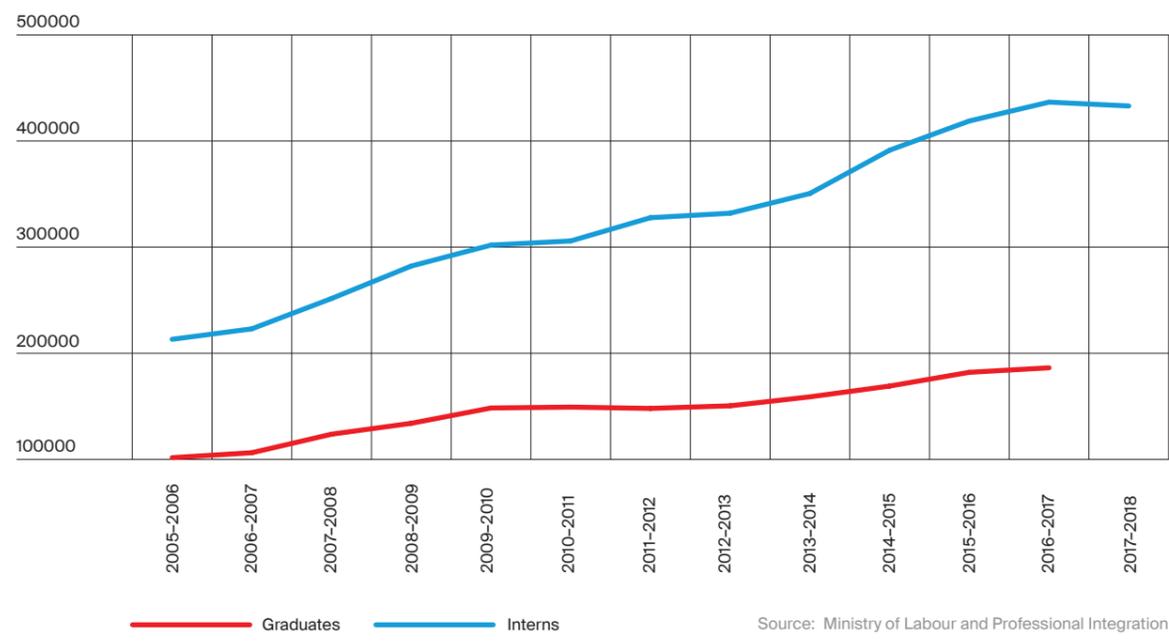
### Vocations

The training offered by the Office of Professional Training and Work Promotion (OFPPT) is organised around the following courses: social action, management and business administration, the food industry, graphic arts, audiovisual and cinema, construction and public works, metal construction, leather, mechanical manufacturing, cold and thermal engineering, electrical engineering, hotel management and tourism, technology information and communication, OFFSHORE, paramedic science, plastics, motor vehicle maintenance, textiles and clothing, transport.

### Data on enrolment (by region, certificates offered)

The number of registrants in vocational training increased from 213,166 trainees in 2005–2006 to 433,007 trainees in 2017–2018. Vocational training graduates increased from 101,674 graduates to 186,333 during the same period.

Figure A2.4: Evolution of the total number of interns and graduates in vocational training



### Vocational training graduates by training sector

In 2017, more than half of the graduates (54%) were concentrated in three training sectors: the mechanical and electromechanical metallurgical industries sector came first (19.4%), followed by the administration, management and commerce sector (17.9%) and the construction sector (16.7%).

### Vocational training graduates by region

At regional level, the most number of vocational training graduates was recorded in 3 regions: Grand Casablanca-Settat (22.9%), Rabat-Salé-Kénitra (19%) and Fès-Meknès (11.9%). The southern regions have the lowest shares, varying between 0.3% and 3.2%.

### Integration of vocational training graduates

For the 2016 cohort, it is the graduates at the lowest levels who find the least difficulty in being employed. In fact, the employment rates of graduates with the professional aptitude certificate (CAP) and the specialisation course reached 58.4% and 50.6% respectively. The employment rate for other levels varies between 44.9% for the qualification course and 47.3% for the specialised technician course.

By training sector, the automotive and marine fishing sectors were the ones that generated the most enthusiasm, with employment rates of 70.3% and 66.8% respectively for the graduates of the 2016 cohort, while the lowest employment rate was recorded among graduates from food industry courses with 36.8%.

Depending on the region, the employment rate of vocational training graduates from the 2016 cohort reveals significant disparities. It ranged from 26.7% in the Oriental region to 63.2% in the Fes-Meknes region, a difference of 36.5%. It should be noted that five out of twelve regions have employment rates below the national average (47.3%).

## B

### Vocational training in companies: Focus on the IDMAJ programme

#### Idmaj Programme

The Idmaj Programme enables young graduates to acquire their first professional experience within a company to promote their integration into professional life and enables companies to develop their human resources by recruiting young graduates. It provides exemptions for social charges owed to the CNSS and vocational training tax.

This programme experienced significant improvements in 2016, in particular with regard to the limitation of the income tax exemption period (24 months instead of 36 months), the initiation of the recruitment obligation of at least 60% of the beneficiaries, the establishment of medical cover, full support from the government to the benefit of the beneficiaries during the period of the internship, and support by the government for the employer's share of the social security payment and the TFP for 12 months in the event of the final recruitment of trainees.

#### Number of beneficiaries of the IDMAJ programme

In 2018, under the improved CI system, 64,354 insertion contracts were signed by ANAPEC and sent to the CNSS for payment of AMO, an increase of 2% compared with 2017; 7,003 companies benefited from this system, with an increase of 11% compared with 2017; 5,369 PCS protocols were signed for a total of 655 companies, an increase of 42% compared with 2017.

In terms of results and since its implementation in 2006, the Idmaj programme has benefited nearly 800,000 jobseekers. In 2018, it benefited more than 102,700 people (an increase of 15.4% compared with 2017), including 15,922 insertion contracts signed as part of international placements.

With the exception of 2012 when it saw a 5.7% drop in the number of beneficiaries, the Idmaj programme has recorded only positive growth rates. It has thus grown by an annual average of 12.6% between 2013 and 2018 and has recorded an average annual growth rate of almost 10% since its launch in 2006.

Despite a continuous increase in the target set for the Idmaj programme (more than 10% on average), it should be noted that since 2014, the annual targets set have largely been achieved. Thus, the rates of achievement of the objectives set vary from 114.8% in 2014 to 120.9% in 2018. These rates remain relatively higher than those recorded during the 2010–2013 period, the maximum rate of which reached 101.6% in 2010.

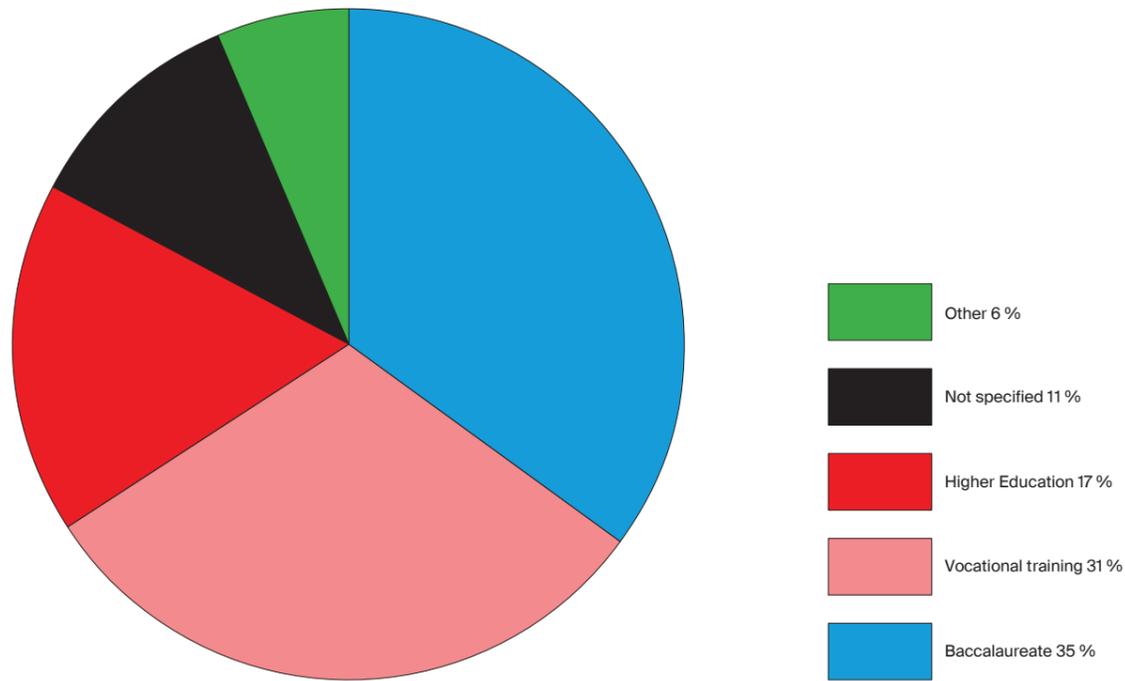
#### Characteristics of beneficiaries of the Idmaj programme

Depending on gender, a quasi-parity in the integration of beneficiaries was observed during the period 2010–2018. The feminisation rate varied from 50.2% in 2010 to 47% in 2012 and settled at 50% in 2018.

Depending on the type of contract, it can be seen that almost three quarters of the beneficiaries (74.1%) are integrated within the framework of training/integration contracts, compared to 23.0% of fixed-term contracts (CDD) and 2.9% of open-ended contracts (CDI). These rates were 56.3%, 38.2% and 5.4% respectively in 2010.

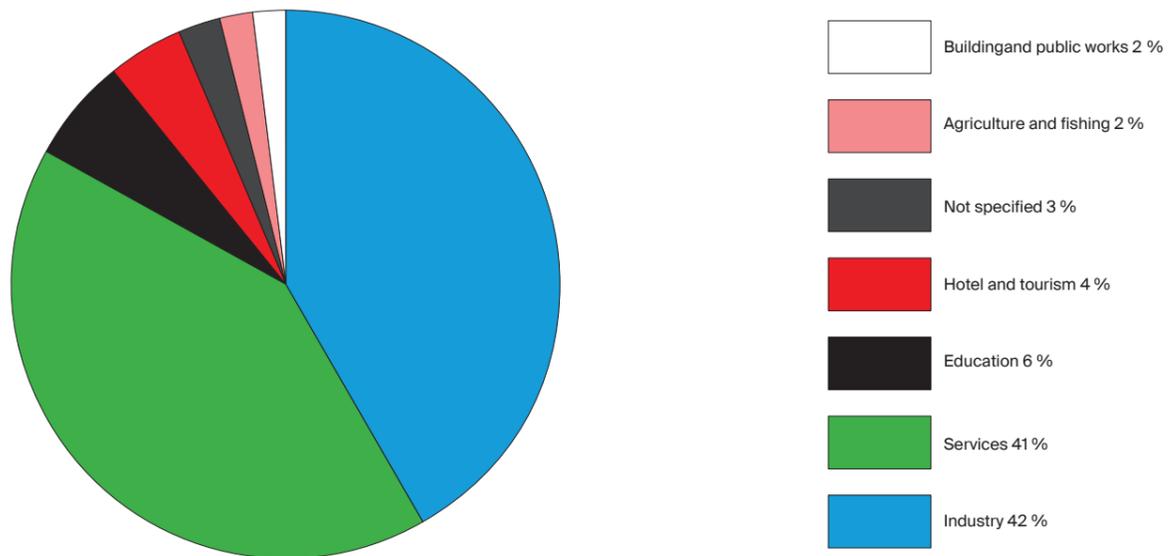
As for the level of qualification, it should be noted that two thirds of the beneficiaries of the Idmaj programme (66%) were holders of Bachelor degrees or graduates of vocational training in 2018. Graduates of higher education represent 16.9% of the total beneficiaries.

Figure A2.5: Distribution of beneficiaries of the Idmaj programme by diploma (2018)



At sectoral level, 83.2% of insertions take place in the industrial and service sectors. Also, the beneficiaries inserted in industry represent 41.9% of all the beneficiaries of the programme in 2018 compared with 36.9% in 2017 and only represent 1.9% in the agriculture and fishing sector compared with 6.4% in 2017. The share of insertions hardly changed in 2018 for service (41.3%), education (6.2%) and building and public works (1.8%) sectors.

Figure A2.6: Distribution of beneficiaries of the Idmaj programme by activity sector (2018)



At regional level, the Casablanca-Tangier axis included almost two thirds (65.4%) of the beneficiaries included in the IDMAJ programme in 2018. Thus 27,430 beneficiaries are registered in the Casablanca-Settat region (31.6%), 21.4% are registered in the region of Rabat-Salé-Kénitra, 12.4% in the region of Tanger-Tétouan-Al Hoceima and 12.8% in the region of Meknès-Fès. The other regions account for less of the beneficiaries of these programmes since the share of the working population is less than 7% in each region and it is less than 2% in the three southern regions.

# IV. Tunisia

At the end of the 9 years' basic cycle (two cycles: 3 years and 6 years), students must pass a national exam to obtain the End of Basic Education Certificate. Holders of this certificate may continue their studies at secondary education level (which lasts for 4 years: one year for general secondary education and three years of specialised secondary education) or enrol for technical and vocational education. At the end of the secondary education level, students take the Baccalaureate exam and are channelled into higher education (for more details, see Limam and Ben Hafaiedh 2018).

Access to higher education is guaranteed to any student who has completed secondary education successfully and holds a 'Baccalauréat' certificate or an equivalent foreign diploma. The admission process to higher education is mainly controlled by the National University Orientation System, which allows the holder of a Baccalauréat to choose his or her university course, depending on the type of Baccalaureate obtained, and on his or her scores and preferences.<sup>58</sup> The majority of students (more than 85%) in the public system are distributed over the following four fields of study: social sciences, business and law (30%), science (20%), engineering, manufacturing and construction (19%), and humanities and arts (16%). For the private system, the classification of the fields of study is as follows: engineering, manufacturing and construction (31%), social sciences, business and law (28%), health and welfare (20%), and science (19%).

The Tunisian VET system includes two types of training: initial training and continuing training, which are regulated by Articles 1 and 26 respectively of Decree No. 2008-10 of 11 February 2008 on vocational training.<sup>59</sup> The VET system aims, in co-ordination with the educational and employment sectors, to provide learners with suitable qualifications on a professional, social and cultural level, to develop their professional capacities, and to provide the economy with the right workforce to improve productivity and competitiveness (Article 1 of Decree No. 2008-10).

The initial training includes the following three cycles (MFPE):

- A first cycle leads to the award of the Technical Ability Certificate - CAP (Certificat d'Aptitude Professionnelle), open to those who have continued their studies up to the end of the ninth year of basic education (preparatory, technical and general).
- A second cycle leads to the award of the Technician Certificate - BTP (Brevet de Technicien Professionnel), open to holders of the CAP certificate and to those who have continued their studies up to the end of the second year of secondary education,
- A higher education course of 2 years leads to the award of the Advanced Technician Certificate - BTS (Brevet de Technicien Supérieur), open to holders of a Baccalaureate and, under certain conditions, to holders of the BTP.

In addition, a training course leading to a Certificat de Compétence (CC) may be provided for students who do not meet the educational requirements for access to the CAP.

Continuing training includes two types (Article 27 of Decree No. 2008-10):

- Continuing training organised by companies to ensure a certain skill level for their personnel in order to remain competitive,
- Continuing training offered by private and public education institutions to improve the chances of professional progression.

<sup>58</sup> The Higher Education System in Tunisia, National report, 2019.

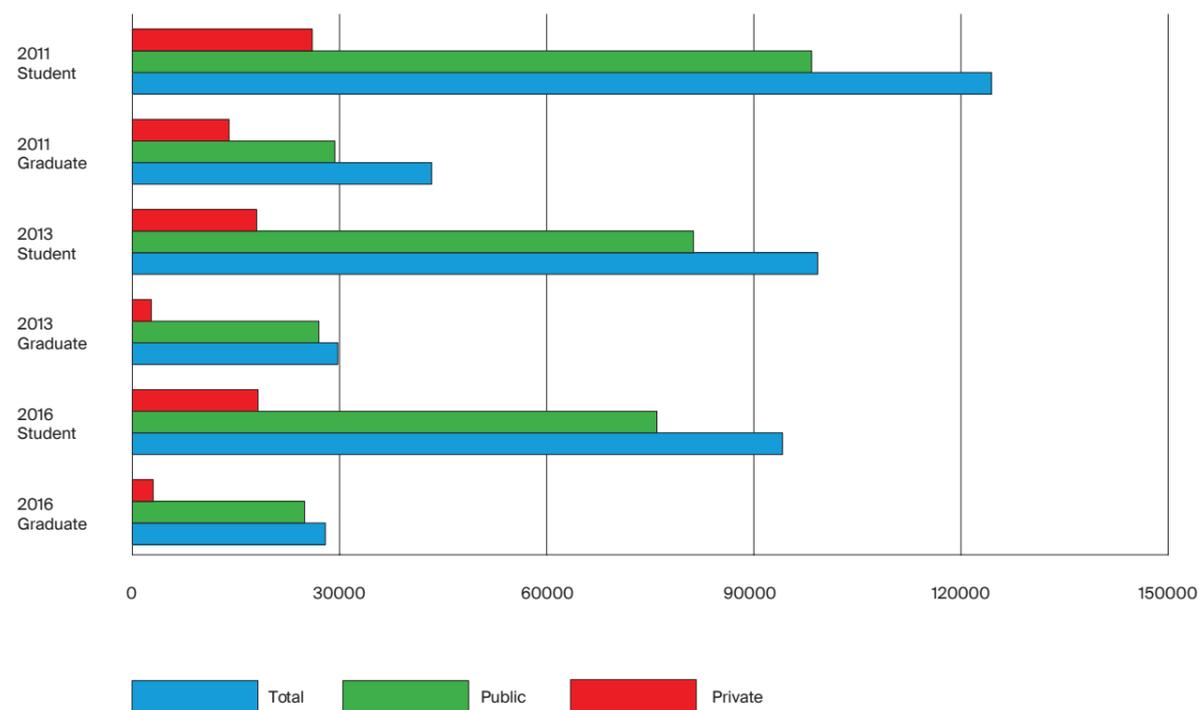
<sup>59</sup> Official Gazette of the Republic of Tunisia – 15 February 2008. N°14.

A

## Initial training (at schools): Trends and challenges

The public system has thus been strengthened by the creation of several centres which have contributed to a significant increase in capacity. The number of students at the public vocational training centres has increased from 29,000 in 2001 to 94,000 in January 2011, of which nearly one quarter were completing apprenticeships.

Figure A2.7: Number of students and graduates in initial training (2011–2016), by sector.



Source: Authors' calculations using data from the National Observatory of Employment and Qualification (ONEQ).

Table A2.3 shows that students in the public vocational training system (providing a diploma in one of the following three programs: CAP, BTP and BTS), were enrolled across thirteen different fields. The largest area of study was electricity and electronics (34.6%), followed by the building and construction discipline (11.87%) and by textiles and clothing (10.67%). For the same programs, the private sector offers seven disciplines. The largest share of students in the private vocational training go to the office, trade and computer jobs (53%) followed by services and miscellaneous industries (41%).

Table A2.8: Distribution of students and graduates in initial training by area and sector, 2016

| Area  | Students (CAP, BTP, BTS) |            | Private       |            | Graduates (CAP, BTP, BTS, CC, CFP, CFA) |            |
|---|--------------------------|------------|---------------|------------|---|------------|
|   | Public                   | Private    | Public        | Private    | Public                                  | Private    |
|   | Number                   | %          | Number        | %          | Number                                  | %          |
| Electricity and electronics   | 18,414                   | 34.6       | 115           | 1.13       | 6,534                                   | 31.57      |
| Building, public works and others   | 6,317                    | 11.87      | 70            | 0.68       | 2,585                                   | 12.49      |
| Textile and clothing  | 5,677                    | 10.67      | 20            | 0.20       | 2,343                                   | 11.32      |
| General mechanics and metal construction  | 5,184                    | 9.74       | 0             | 0          | 1,984                                   | 9.59       |
| Transport, driving and vehicle maintenance, public works and agricultural machinery | 4,869                    | 9.15       | 181           | 1.77       | 2,373                                   | 11.47      |
| Office, trade and computer jobs   | 4,792                    | 9.01       | 5,424         | 53.06      | 1,333                                   | 6.44       |
| Tourism and hotels  | 3,620                    | 6.80       | 203           | 1.99       | 1,418                                   | 6.85       |
| Services and miscellaneous industries   | 2,503                    | 4.70       | 4,209         | 41.18      | 968                                     | 4.68       |
| Fisheries and aquaculture   | 471                      | 0.89       | 0             | 0          | 171                                     | 0.83       |
| Food processing industry  | 403                      | 0.76       | 0             | 0          | 473                                     | 2.29       |
| Art and crafts  | 392                      | 0.74       | 0             | 0          | 248                                     | 1.20       |
| Agriculture   | 384                      | 0.72       | 0             | 0          | 138                                     | 0.67       |
| Leather and shoes   | 186                      | 0.35       | 0             | 0          | 127                                     | 0.61       |
| <b>Total</b>  | <b>53,212</b>            | <b>100</b> | <b>10,222</b> | <b>100</b> | <b>20,695</b>                           | <b>100</b> |

Source: Authors' calculations using data from the ONEQ, 2016.

Table A2.9 shows the distribution of students and graduates in initial training by gender and programme for public and private sectors in 2016. Women account for only 33% of students enrolled for vocational training offered by the public sector, compared with 71% for the private sector. However, in both sectors, male and female enrolment in BTS (higher education) is still a minority and does not exceed 16%.

Table A2.9: Distribution of students and graduates undertaking initial training by gender, programme and sector, 2016

|                 | Public        |               | Private      |               |
|-----------------|---------------|---------------|--------------|---------------|
|                 | Male          | Female        | Male         | Female        |
| <b>Student</b>  |               |               |              |               |
| CAP             | 13,757        | 4,238         | 378          | 1,605         |
| BTP             | 16,585        | 8,425         | 1,659        | 4,152         |
| BTS             | 6,380         | 3,827         | 869          | 1,559         |
| Others          | 14,024        | 8,725         | 2,425        | 5,549         |
| <b>Total</b>    | <b>50,746</b> | <b>25,215</b> | <b>5,331</b> | <b>12,865</b> |
| <b>Graduate</b> |               |               |              |               |
| CAP             | 5,163         | 1,608         | 145          | 590           |
| BTP             | 5,408         | 2,962         | 364          | 1,048         |
| BTS             | 1,989         | 1,179         | 311          | 553           |
| Others          | 4,315         | 2,318         | N/A          | N/A           |
| <b>Total</b>    | <b>16,875</b> | <b>8,067</b>  | <b>820</b>   | <b>2,191</b>  |

Source: Authors' calculations using data from the ONEQ, 2016.

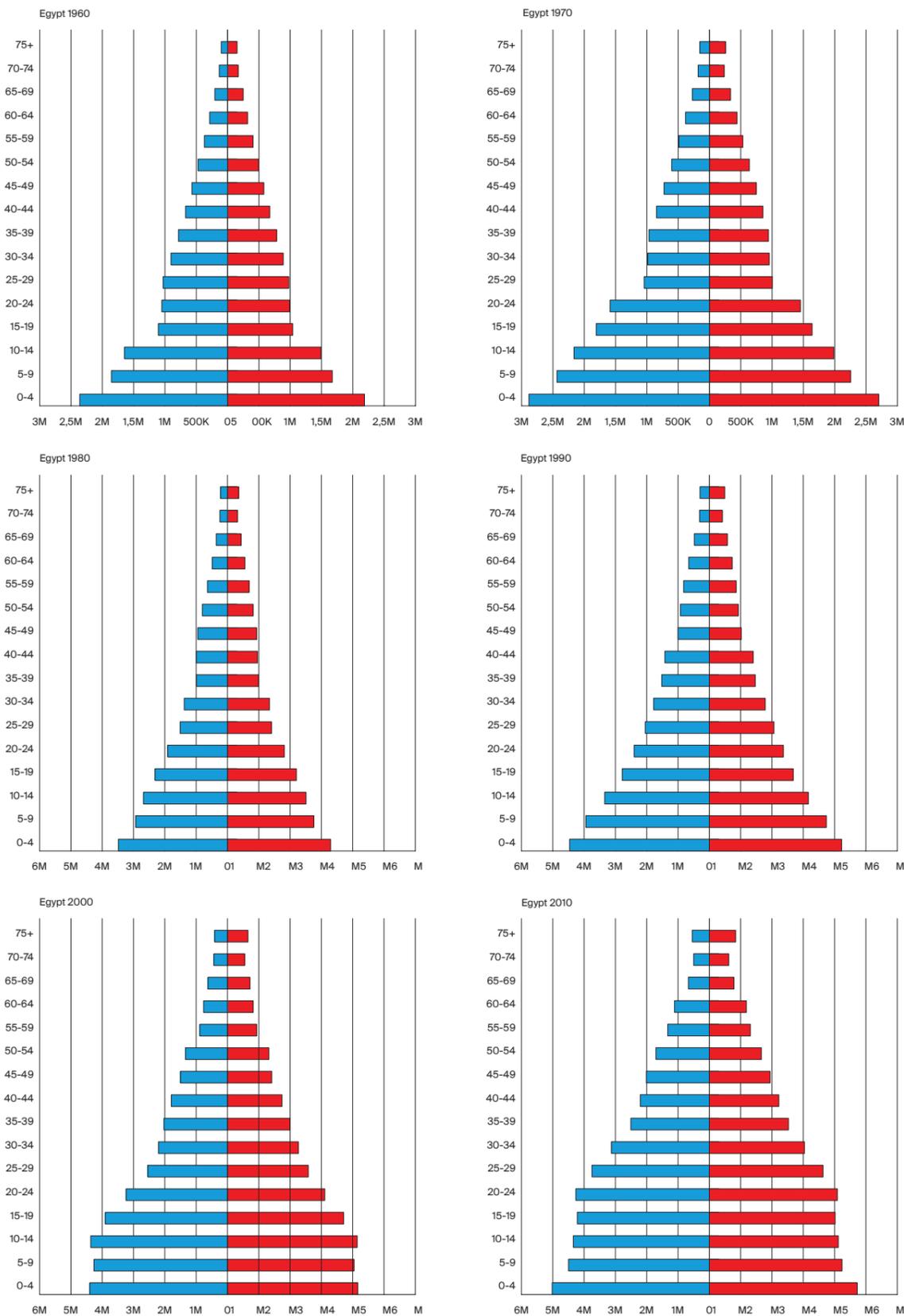
## B

## Continuing training: Trends and challenges

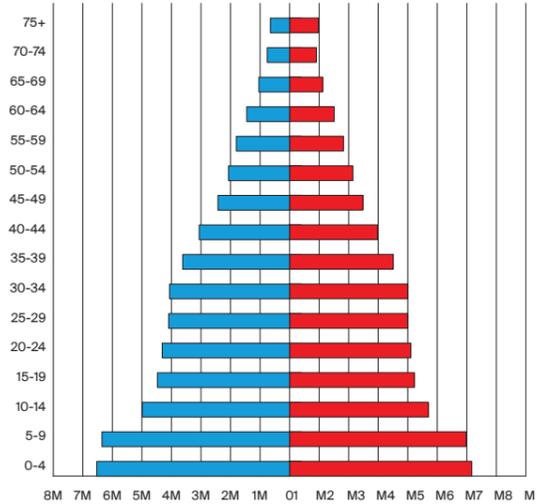
Continuing training serves a large population of workers (with educational levels ranging from the third year of secondary school up to university graduates) who wish to improve their qualifications and obtain a formal degree. It is governed by the National Continuing Education Centre and Professional Promotion (CNFCPP), which comes under the responsibility of the Ministry of Vocational Training and Employment (MFPE). The CNFCPP allows employees to acquire training within 7 Institutes of High Promotion of Labour (IPST), covering all the 24 governorates of Tunisia, through distance learning and evening classes. In 2018, 8,467 employees were enrolled for professional promotion compared with 9,029 in 2016 (see Table A.3 in Annexe 1 for more details).

# Annexe 3: Population Pyramids for Egypt, Jordan, Morocco and Tunisia, 1960-2050

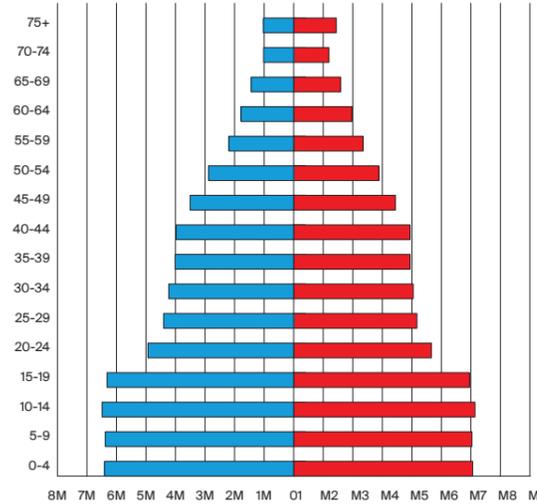
Population Pyramids, Egypt 1960-2050



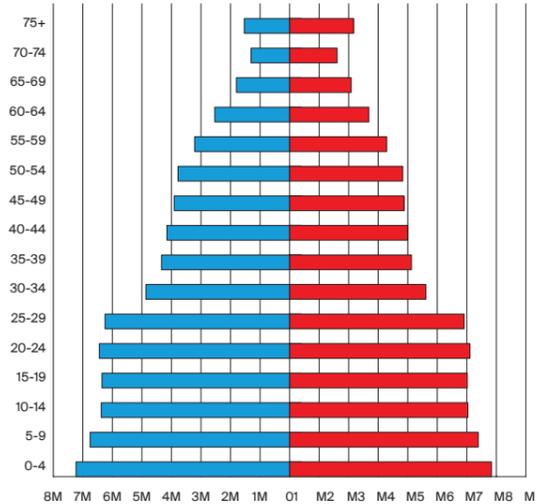
Egypt 2020



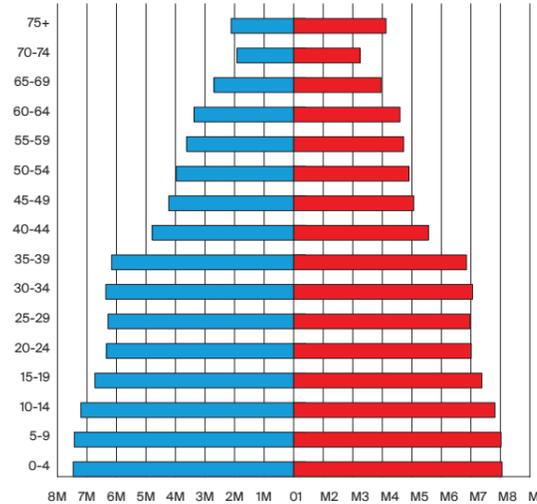
Egypt 2030



Egypt 2040

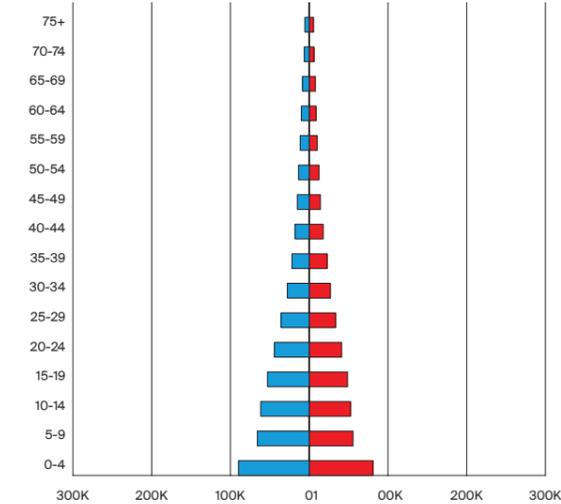


Egypt 2050

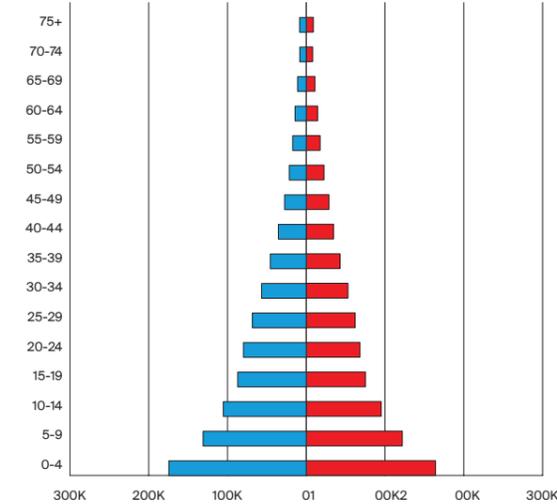


### Population Pyramids, Jordan 1960-2050

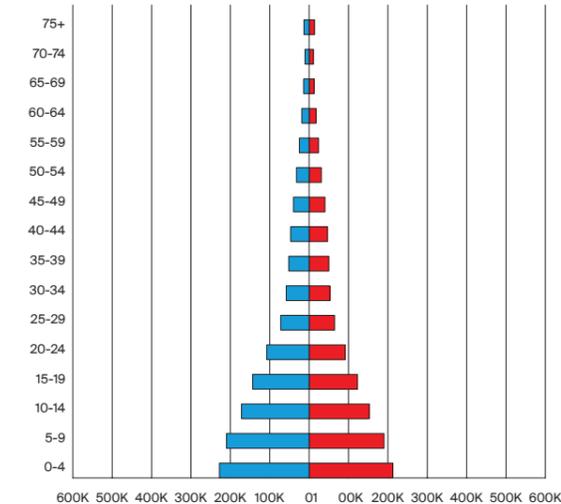
Jordan 1960



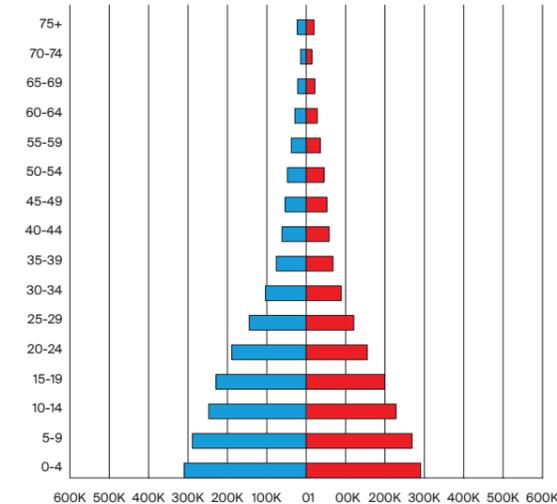
Jordan 1970



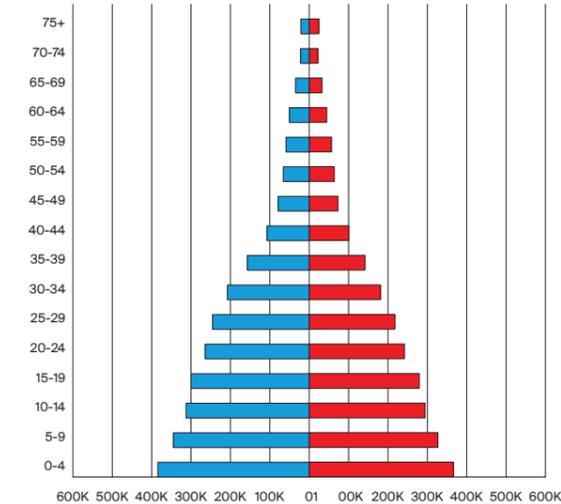
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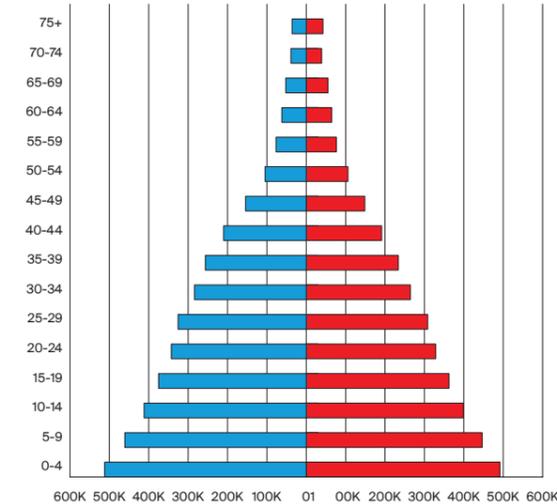
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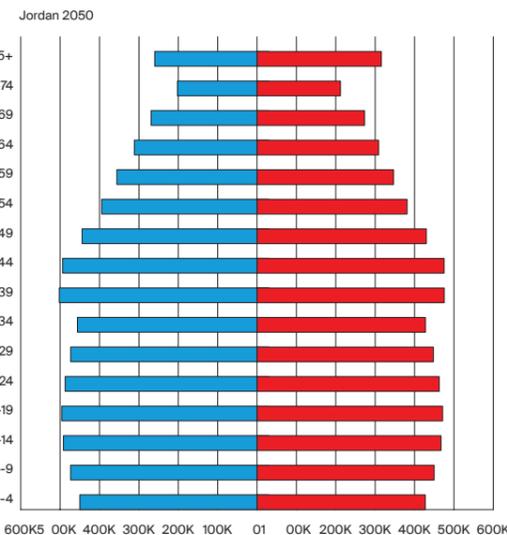
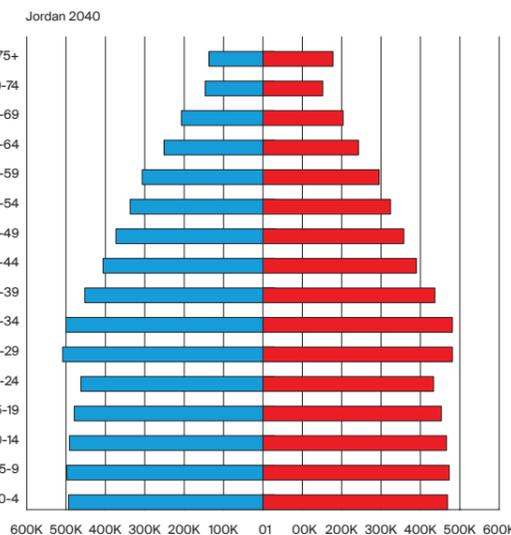
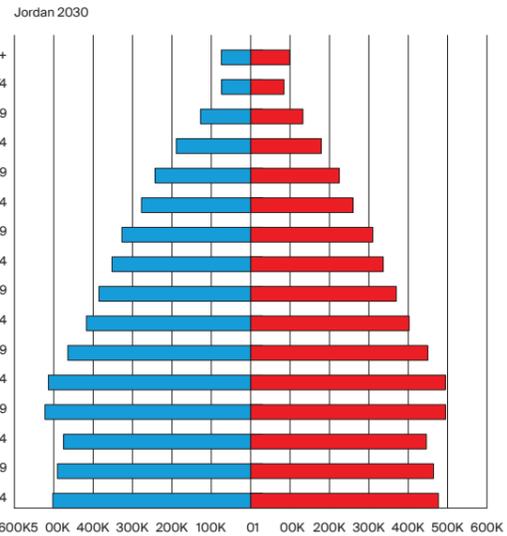
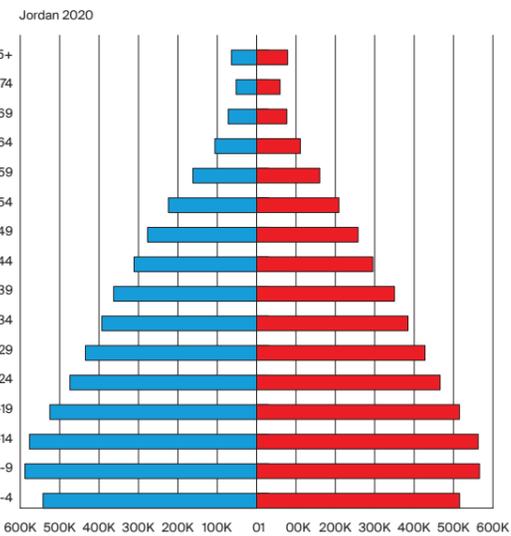


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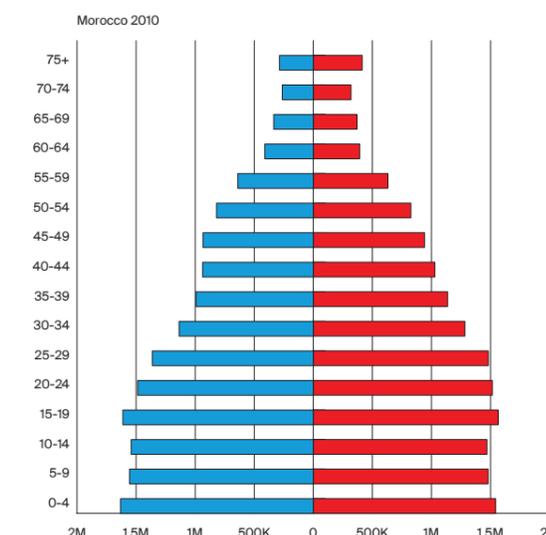
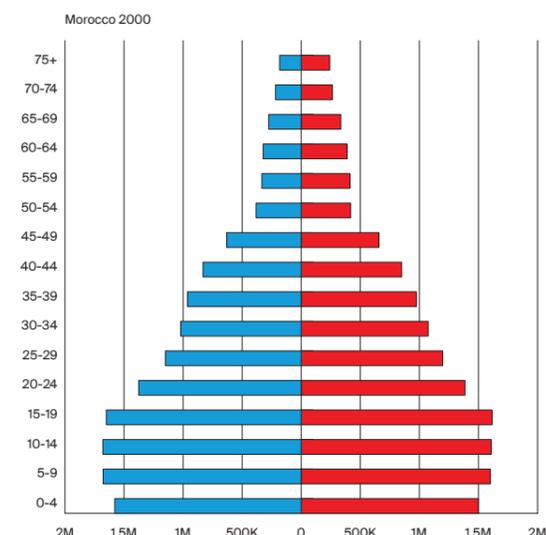
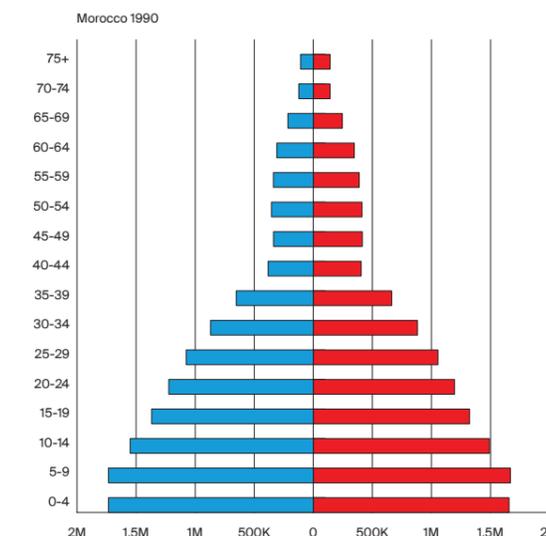
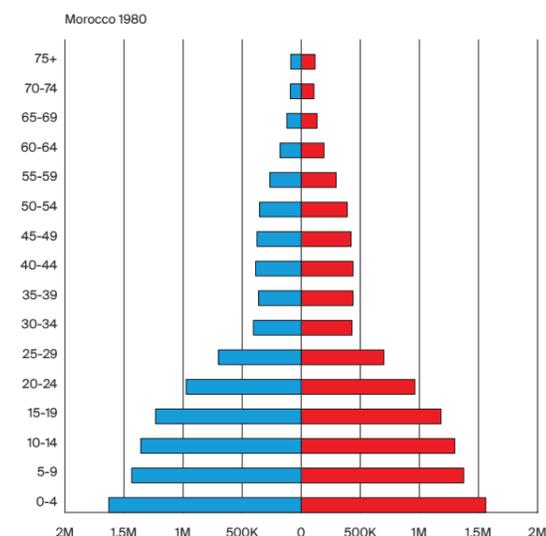
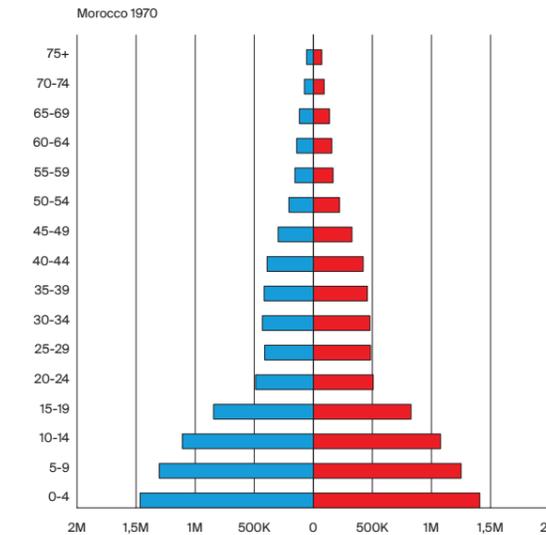
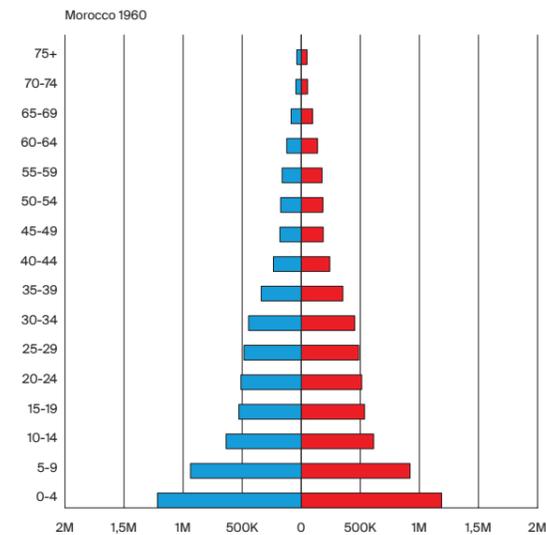


Jordan 2010

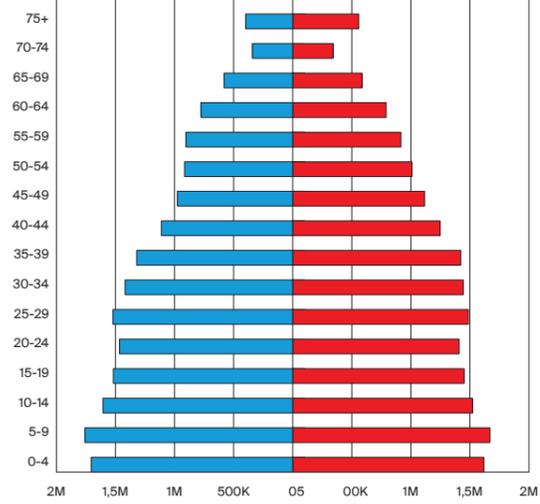




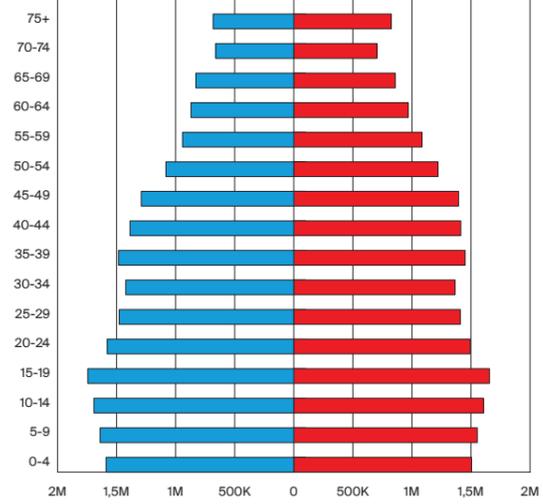
### Population Pyramids, Morocco 1960-2050



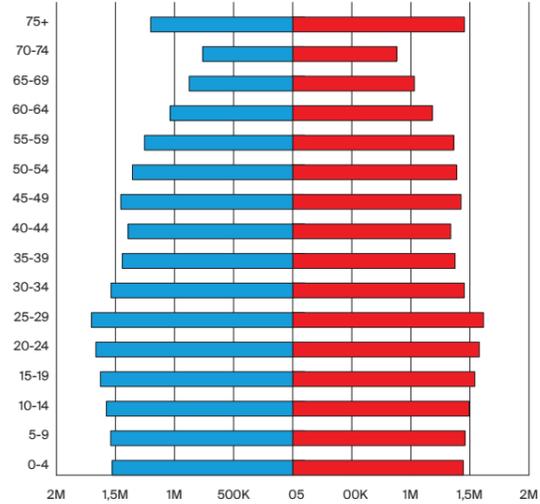
Morocco 2020



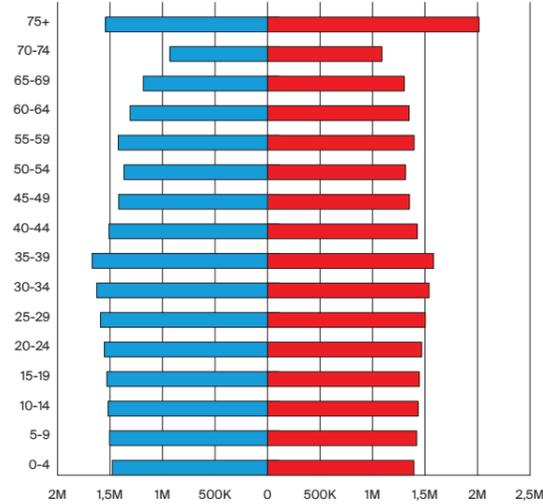
Morocco 2030



Morocco 2040

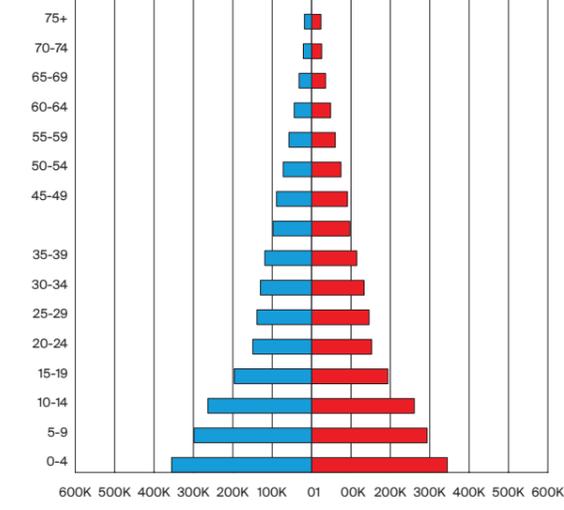


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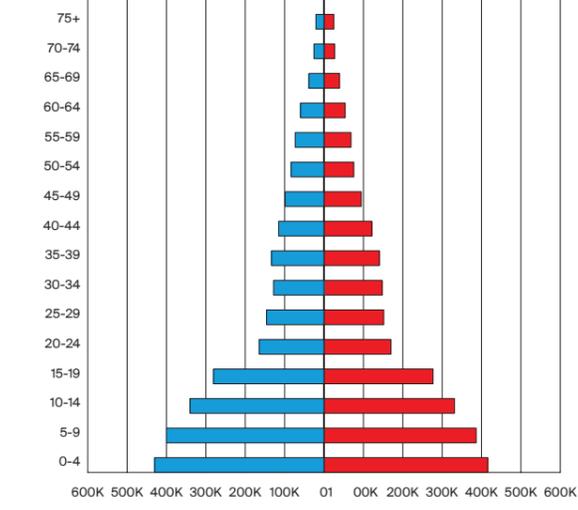


### Population Pyramids, Tunisia 1960-2050

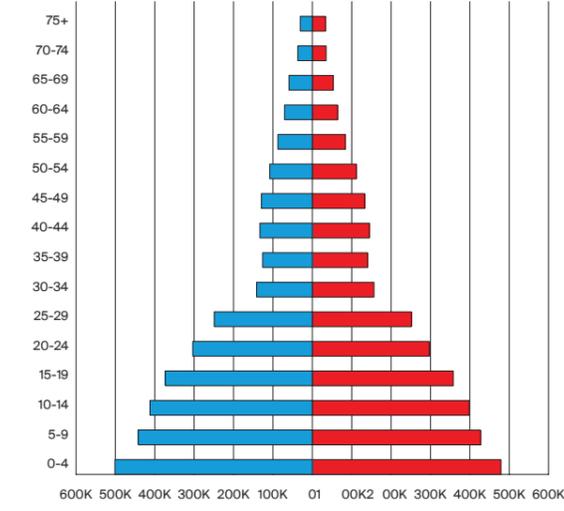
Tunisia 1960



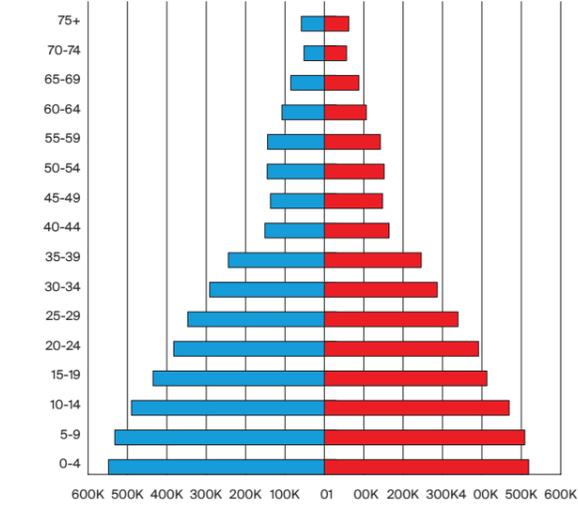
Tunisia 1970



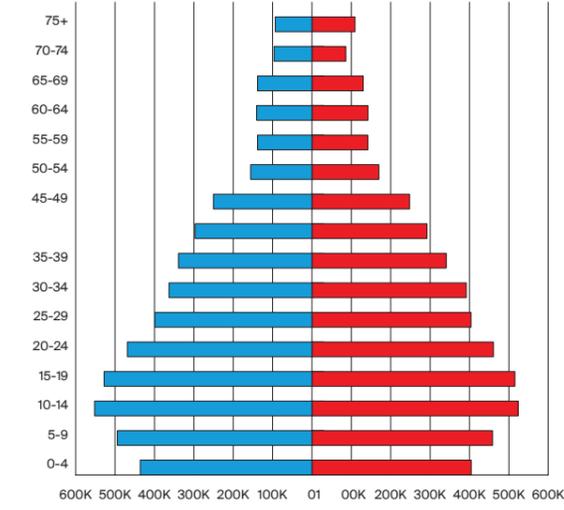
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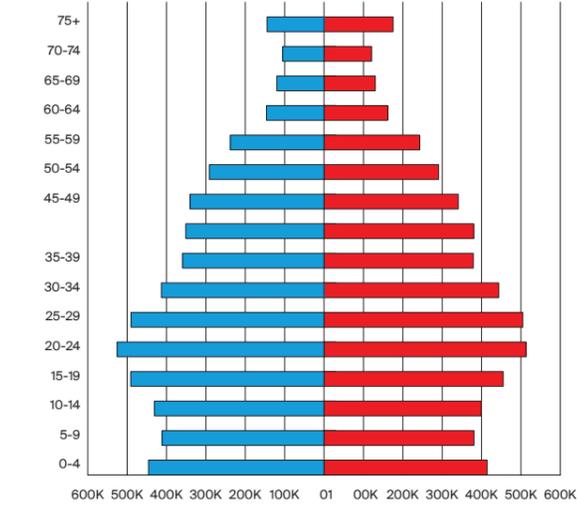
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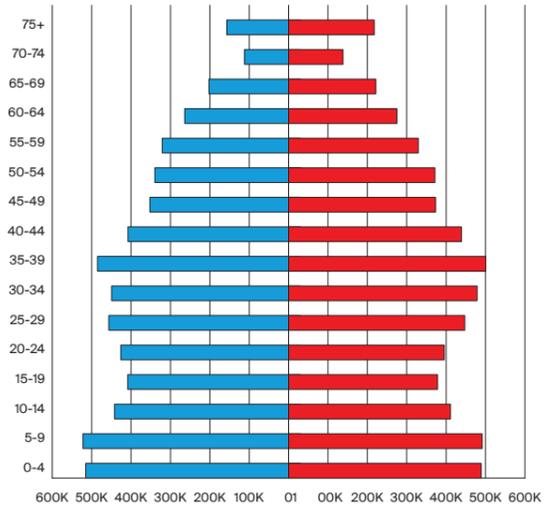
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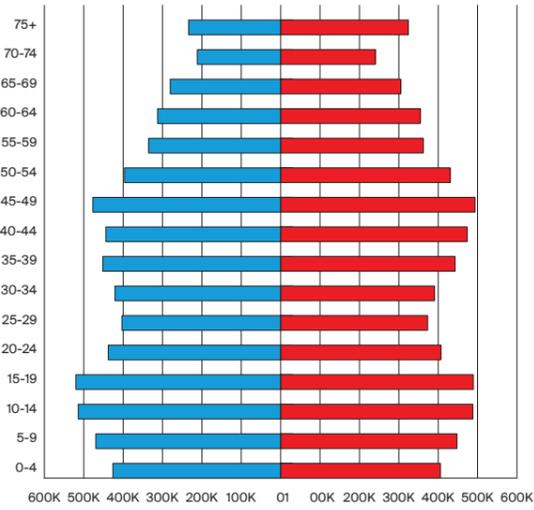
Tunisia 2010



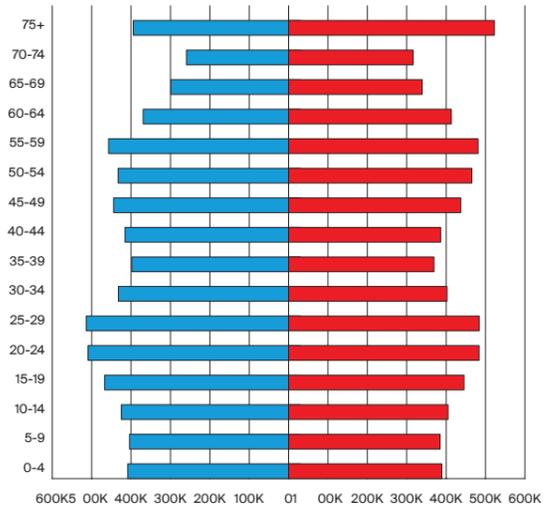
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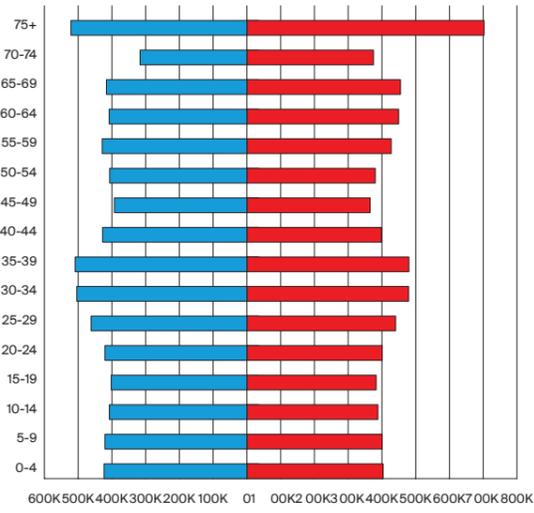
Tunisia 2030



Tunisia 2040



Tunisia 2050



# Annexe 4: ALMPs in EJMT

## I. Egypt

The main issue related to employment in Egypt is the slow pace of private sector growth. The private sector is not able to provide a substitute to public employment due to a number of challenging constraints that hinder job creation, especially within SMEs. The focus therefore needs to be on stimulating economic growth, subsequently leading to job creation. Effective macroeconomic policies should therefore be focused on pro-employment growth to bring about the inclusive economic growth that aims to improve the social and economic conditions of everyone. These policies include incentives for entrepreneurs to shift production to higher value goods and services as well as investment in education and training to enhance skills and therefore employability.

Implementing ALMPs in Egypt has a long history that goes back to the 1990s and has primarily focused on skills development and self-employment. In this regard, the Social Fund for Development (SFD) was created in 1991. In the 2000s, skills training has been combined with financial services and access to credit to promote entrepreneurship and improve the sustainability of business projects created. After 2011, different types of ALMPS have started to be combined to form comprehensive programmes targeting the employment of the most vulnerable groups, for example:

- Decent Jobs for Egypt's Young People (ILO)
- Neqdar Nesharek (Population Council)
- Emergency Labour Intensive Investment Project (SFD, WB, EU and UNDP)
- Emergency Employment Investment Project (SFD, WB, EU and UNDP)

Currently, the main two types of ALMP implemented for improving the employability of youth in Egypt are the ones focusing on skills development and entrepreneurship promotion programmes. Approximately 200 public and non-public youth employment programmes were documented for Egypt, 25 percent of them focused on combining skills training with employment services, 16 percent focused on combining skills training with entrepreneurship promotion, 21 percent focused on skills training only and 19 percent on entrepreneurship promotion only.

ALMPs in Egypt currently focus on four key categories: skills development, entrepreneurship, employment services and wage subsidies.

### Skills development

ALMPs focusing on skills development have focused on training provisions outside the formal education system with a typical duration of less than six months. These programmes target technical and vocational training, soft skills training, on-the-job training and literacy and numeracy training. This training has been identified as responding to mismatch or an absence in technical skills, behavioural and soft skills, work experience or insufficient basic skills.

### Entrepreneurship promotion

ALMPs mainly address start-up constraints and also promote company growth and contribute to greater labour demand. Programmes mainly focus on entrepreneurship and business training, access to finance, advisory services and access to markets.

### Employment services

These services consist mainly of a number of separate or combined initiatives, including career guidance and counselling, job search assistance, job placement and matching services, referrals to other services and skill certification and training centre accreditation. These initiatives work to address job search constraints and limited labour market information.

### Subsidised employment

Two broad types of initiative are related to subsidised employment. These two broad initiatives are public work/services and wage subsidies. Both initiatives aim to address the constraints related to the decline in labour demand in the economy. Subsidised employment intends to either directly create employment or encourage hiring.

Table A4.1: Categories of ALMP with main objectives and specific policy options

| ALMP category              | Main objective   | Policy options  |
|----------------------------|--|---|
| Skills training            | Upgrade skills (soft and hard)<br>Match skills with the needs of the labour market   | TVET<br>Financial and non-financial support for trainees<br>Incentives for employers to provide training<br>Institutional capacity building |
| Employment services        | Provide job seekers with the means of improving the way they showcase their competencies and skills<br>Address information deficits for jobseekers and employers<br>Improve matching<br>Increase job search efficiency<br>Enhance career prospects | Job search assistance<br>Job counselling<br>Job placement services  |
| Entrepreneurship promotion | Provide knowledge and skills needed to start and run a business<br>Facilitate access to financial and non-financial resources  | Entrepreneurship training<br>Advisory services<br>Provision or facilitation of access to finance  |
| Subsidised employment      | Offer opportunities to accumulate work experience<br>Motivate employers to create and maintain job opportunities   | Wage subsidies<br>Public work/employment guarantee programme<br>Employment in a public service  |

### Labor market programmes and main implementing institutions

Among the projects undertaken by the different stakeholders for skills development are:

- Non-formal training provision by NGOs
- Mubarak Kohl Initiative by GIZ to integrate classroom-based training with on-the-job training.
- Sectoral enterprise training partnerships
- Decent Jobs for Egypt's Young People by ILO to train the long-term unemployed to reintroduce them to the labour market

For entrepreneurship promotion:

- Entrepreneurship programme by the SFD to raise awareness of entrepreneurship among young people, women and university students
- Microfinance and non-financial services through NGOs
- Incubators and accelerators
- Know About Business Toolkit by ILO to introduce entrepreneurship concepts in the curricula of technical schools.

For employment services:

- Egyptian Labour Market Service Reform Programme for improving office equipment and facilities of public employment offices
- Transition to employment, providing career guidance for young people and job creation
- Decent Jobs for Egypt's Young People
- National Employment Pact providing employment services to blue-collar workers
- Career and Entrepreneurship Development Offices by Nahdet El Mahrousa NGO operating in Egyptian universities
- Meshwary Project by UNICEF to use ICT channels to deliver employment services
- Egyptian Education, Training and Employment Observatory by IDSC and ETF to develop skills, analyse information and predict education, training and employment needs to fulfil labour market requirements.

Finally, for subsidised employment

- The Emergency Labour Intensive Investment Project and the Emergency Employment Investment Project, two programmes by the SFD, WB, EU and UNDP to mitigate the negative impact on employment of the economic slowdown occurring in and after 2011
- Urgent plan to activate the Egyptian economy to support and enhance industry and services and provide industrial training amongst other things.

Table A4.2: Main implementing institutions in Egypt

|   | Institution  | Role   |
|---|--|--|
| <b>Governmental and semi-governmental entity</b>    | The Ministry of Manpower<br>The Ministry of Trade and Industry<br>The Ministry of Higher Education<br>The Ministry of Education and Vocational Education<br>The Ministry of Planning<br>The Ministry of International Cooperation<br>The Social Fund for Development | Implementing, monitoring and evaluating Egypt's employment strategy                                  |
| <b>Other ministries</b>                             | The Ministry of Communication and Information Technology<br>The Ministry of Youth and Sports<br>The Ministry of Local Development<br>The Ministry of Social Solidarity   | Further employment promotion initiatives under the mandate of other ministries                       |
| <b>NGOs</b>   | The Alexandria Business Association<br>Nahdet El Mahrousa<br>Education for Employment<br>Misr El Kheir<br>Sawiris Foundation for Social Development  | Strongly supporting employment promotion efforts for youth through a number of different programmes. |
| <b>Incubations and business acceleration models</b> | AUC Venture Lab<br>Injaz<br>Enactus<br>Endeavour Egypt<br>Flat 6 labs<br>Egyptian Junior Business Association  | Providing innovative examples of start-ups and SMEs in Egypt   |
| <b>International organizations</b>                  | The World Bank<br>ILO  | Playing an active role in promoting youth employment   |
| <b>International development agencies</b>           | GIZ<br>USAID<br>EU   |  |
| <b>Research-oriented think tanks</b>                | ERF<br>ECES<br>The Population Council  | Contributing to a collective and accurate understanding of the labour market in Egypt                |

# II. Jordan

The Youth Employment Initiative in Jordan consists of a sample of 84 ALMPs targeting young people in Jordan. Some of these policies were completed between 2012 and 2016, others are still ongoing. These 84 policies can generally be divided into four main categories: skills training, employment services, entrepreneurship promotion and subsidised employment.

The supply-side policies, including skills training and employment services, are expected to increase the employability of Jordanian young people and facilitate job matching in the Jordanian labour market. The demand-side policies, on the other hand, including entrepreneurship promotion and subsidised employment services, contribute mainly to job creation. The ALMPs work together on creating and sustaining a work environment connecting jobseekers with the labour market. The supply-side policies are the ones more frequently offered and more commonly provided, as opposed to the demand-side policies.

Table A43: **Categories of ALMP with main objectives and specific policy options**

| ALMP category              | Main objective   | Policy options  |
|----------------------------|--|---|
| Skills training            | Upgrading skills (soft and hard)<br>Matching skills with the needs of the labour market  | TVET<br>Financial and non-financial support for trainees<br>Incentives for employers to provide training<br>Institutional capacity building |
| Employment services        | Providing jobseekers with the means to improve the way they showcase their competencies and skills<br>Addressing information deficits for jobseekers and employers<br>Improving matching<br>Increasing job search efficiency<br>Enhancing career prospects | Job search assistance<br>Job counselling<br>Job placement services  |
| Entrepreneurship promotion | Providing the knowledge and skills needed to start and run a business<br>Facilitating access to financial and non-financial resources  | Entrepreneurship training<br>Advisory services<br>Provision or facilitation of access to finance  |
| Subsidised employment      | Offering opportunities to accumulate work experience<br>Motivating employers to create and maintain job opportunities  | Wage subsidy<br>Public works/employment guarantees programme<br>Employment in a public service  |

Interventions by the Jordanian economy have largely depended on incorporating multiple components. The most common combination is a mix of skills training and employment services, while entrepreneurship promotion is the most common stand-alone service. Most interventions provide short-term services to beneficiaries, with a duration of up to six months.

Skills training programmes are the most frequently provided ALMP in Jordan. In general, skills training programmes can improve labour market outcomes, although this largely depends on the specific needs of the beneficiaries and the specific design of the programme.

With regards to the funding and the implementation of the ALMPs, this is mostly shared between the Jordanian Government and other institutions, both local and international. The Jordanian Government, together with foreign donor agencies, work on funding the youth employment programmes. Together, the Jordanian Government and the international donor country agencies cover approximately 80 percent of the funding, with smaller contributions from other funding agencies.

The Jordanian Government, together with NGOs, are the main implementing agencies. The private sector is also involved in implementation, but on a smaller scale. The interventions by the private sector are mostly concerned with skills training provision with very a limited role in providing employers with financial incentives to provide the training.

Evidence on the impact of ALMPs on youth employment is very hard to come by. This impact evaluation is very necessary to help understand what interventions work and why and what country-specific factors should be taken into consideration when designing policies and interventions. Very few impact evaluation studies exist in Jordan and this therefore limits the understanding of the effectiveness of the policies and interventions implemented. The most common tool to assess the effects of ALMPs is through monitoring the transition phase from school to work, or the time period of unemployment upon completion of training. However, more needs to be done in the evaluation to be able to effectively design and re-design policies and interventions that are impactful.

In addition to the limited evaluation, other challenges exist for the effectiveness of the ALMPS in Jordan. These challenges involve matching, as most of the interventions target the educated youth, with very limited interventions for vulnerable young people and other groups of disadvantaged young people. This lack of specific targeting of the most needed may fail to address challenges faced by the groups most in need.

Key state and non-state stakeholders in Jordan are working on a number of economic and labour market objectives. The state and non-state stakeholders have one main objective in mind, catering to the needs of the Jordanian labour market, while attending to its imbalances and maintaining the economic growth necessary. Table A2.4 below outlines the key state and non-state key stakeholders in labour market policies in Jordan, outlining their main objectives.

Table A4.4: Key state and non-state stakeholders in Jordan

| State                           | Objectives   | Non-state                | Objectives   |
|---------------------------------|--|--------------------------|--|
| Ministry of Labour              | Reducing unemployment<br>Reducing poverty<br>Regulating the supply of migrant workers  | Official trade unions    | Securing a better life for workers and raising their standard of living<br>Promoting social and economic development<br>Increasing economic productivity   |
| E-TVET Council and Fund         | Improving skills training in collaboration with the private sector<br>Addressing skills needed for the key economic sectors  | Independent trade unions | Increasing wages and benefits<br>Formalising informal municipal workers  |
| Vocational Training Corporation | Training the workforce<br>Classifying professional practitioners and enterprises<br>Creating and developing SMEs   | Chamber of Commerce      | Collaborating with government on trade and services policies, strategies and action plans<br>Participating in promoting development of trade and service sectors   |
| Civil Service Bureau            | Managing the HR employed by public sector<br>Training civil servants<br>Assisting civil service job-seekers to find alternative opportunities in the private sector  | Chamber of Industry      | Collaborating with government on industrial policies, strategies and action plans<br>Participating in promoting development of industrial sector<br>Representing the interests of the industrial and craft enterprises |
| Social Security Corporation     | Providing social protection to Jordanian workers and families<br>Enhancing social security programmes<br>Promoting fair income distribution within and across generations.   |                          |  |
| Economic and Social Council     | Supporting government decision makers in promoting sustainable economic and social development<br>Promoting dialogue between labour, employers and government on economic and social policies<br>Assessing the impact of economic and social legislation |                          |  |
| Council of Ministries           | Reducing unemployment<br>Reducing poverty<br>Expanding the middle class<br>Managing the budget deficit<br>Improving economic performance<br>Attracting job creation investment<br>Improving education and vocational training                            |                          |  |
| Parliament                      | Reducing unemployment<br>Reducing poverty  |                          |  |

# III. Morocco

The National Agency for the Promotion of Employment and Skills (ANAPEC) provided, through its network of 86 agencies, services for the benefit of both jobseekers and potential employers. ANAPEC actively contributes to the development and implementation of the executive programme of the National Plan for the Promotion of Employment.

ANAPEC's achievements in 2018 concerning active employment programmes in quantitative terms were as follows:

- Integration of more than 100,000 job seekers in the professional environment
- Benefits for more than 7,000 companies from the improved insertion contracts scheme
- Improvement of the employability of more than 27,000 jobseekers with integration difficulties
- Creation of more than 1,351 socioeconomic activities (873 companies, 305 cooperatives, 173 individual activities).

The number of positioning interviews carried out for jobseekers reached approximately 85,000 in 2018, representing a decrease of almost 3 percent compared with 2017. However, the number of participants in job search workshops has grown steadily over the past five years, reaching more than 57,000 participants, an increase of 16 percent on average per year during the period 2014–2018.<sup>60</sup>

By diploma, 21 percent of those registered with ANAPEC are graduates of vocational training, 21 percent Baccalaureate graduates, and only 15 percent of graduates of higher education.

Table A4.5: Evolution of ANAPEC services, 2010–2018

| Year | Number of positioning interviews | Number of participants in job search workshops |
|------|----------------------------------|--|
| 2010 | 69,297                           | 30,967   |
| 2011 | 79,662                           | 37,430   |
| 2012 | 68,948                           | 45,633   |
| 2013 | 67,946                           | 40,273   |
| 2014 | 75,265                           | 40,379   |
| 2015 | 71,651                           | 40,784   |
| 2016 | 85,089                           | 54,843   |
| 2017 | 87,325                           | 48,737   |
| 2018 | 84,466                           | 57,524   |

Source: ANAPEC

With regards to looking for job offers, the visits made by ANAPEC employment counsellors to companies enabled the collation of nearly 118,000 vacancies for 2018, an increase of 16 percent compared with 2017.<sup>61</sup>

By job profession, 16 percent of the job offers collated relate to the profession of automatic machine operator, followed by that of general or seasonal agricultural assistant (12 percent). By sector of activity, 40 percent of the job vacancies collated come from the industrial sector, followed by the service sector (33 percent) and the agricultural and fishing sector (15 percent).

<sup>60</sup> It should be noted that the number of new registrants to ANAPEC in 2018 reached nearly 200 000, of which 44 percent are women and more than two thirds of young people under 25 years of age. More than half of the registrations were made in the Casablanca-Tangier axis.

<sup>61</sup> Almost half (48 percent) of the job vacancies collated are concentrated on the Casablanca-Kenitra axis, followed by the Tangier-Tetouan-Al Hoceima region (12 percent) and Fès-Meknes (10 percent).

Table A4.6: Evolution of job vacancies collated by ANAPEC, 2010–2018

| Year | Number of job vacancies collated by ANAPEC |
|------|--|
| 2010 | 95,337                                     |
| 2011 | 102,684                                    |
| 2012 | 79,767                                     |
| 2013 | 76,780                                     |
| 2014 | 89,624                                     |
| 2015 | 94,028                                     |
| 2016 | 90,232                                     |
| 2017 | 102,054                                    |
| 2018 | 118,803                                    |

Source : l'ANAPEC.

### The international employment mediation of Moroccans by ANAPEC

The development of international employment mediation constitutes a strategic orientation which offers job seekers new opportunities for integration into working life.

ANAPEC has positioned itself by signing partnership agreements with several foreign countries such as Spain, Canada, France and Qatar.

- With Spain through the recruitment of 15,114 workers in the province of Huelva in 2018.
- The partnership between the Canadian Embassy in Morocco and ANAPEC has intensified, given the significant skills requirement experienced by the different provinces of Canada.

2018 saw the placement by ANAPEC of 15,922 Moroccans internationally, an increase of more than 200 percent compared with 2017 (5,634). This increase in the number of employees placed is mainly due to the increase in manpower requirement in the agricultural sector in Spain.

ANAPEC also provides a range of services for immigrants in a regular situation.<sup>62</sup> The support provided in setting up businesses is within the framework of the AMUDDU project for regularised migrants and through ANAPEC/ODCO/UNHCR and the AMAPPE partnership for refugees. The latter partnership is funded by the EU.

Regularised migrants: the range of services for legal immigrants launched in 2015 with the support of the European Union (Sharaka Project) was marked by several achievements, notably the initiation of registration on ANAPEC's portal, the simplification of the recruitment procedure by the exemption from the activity certificate and the initiation of the benefits from the various employment promotion measures: the IDMAJ programme, the contractual training for FCE employment, the qualifying training or retraining FQR, the TAHFIZ programme and the CIP professional integration contract.

2018 saw the continuation of the testing of the services offered at 10 pilot agencies and in close collaboration with civil society organisations and the institutional partner Entraide Nationale. Thus, in 2018:

- 604 migrants registered with ANAPEC; 158 migrants benefited from positioning interviews
- 141 migrants benefited from job search workshops
- 727 possible job offers were recorded in the information system by migrants looking for work
- 23 migrants have been inserted on the labour market
- 3,486 text messages were sent to migrants registered for job week and the launch of the 2018 qualifying training.

Refugees are also taken into account in the framework of an ANAPEC/UNHCR/ODCO and AMAPPE partnership. This project aims to support the professional integration of refugees in Morocco so that they can find a lasting solution, and this through the achievement of the following specific objectives:

Assisting refugees to become self-sufficient by setting up and strengthening microprojects.  
Raising awareness and informing refugees of the formalisation of their microprojects through awareness workshops on the creation of cooperatives and on the status of self-employed;  
Strengthening the capacities of ODCO and ANAPEC officials to support refugees.

This project was launched in 2018 and its partners (UNHCR/ODCO/AMAPPE) have worked on:  
The acceptance and orientation by the UNHCR of 228 refugees, including 31 women;  
The elaboration of feasibility studies of 169 refugees, including 20 women;  
The funding of 117 project leaders, including 18 women.

Table A4.7: Distribution of Moroccan beneficiaries of international mediation by host country

| Country              | Number of beneficiaries | %            |
|----------------------|-------------------------|--------------|
| Spain                | 15,192                  | 95.4         |
| Qatar                | 393                     | 2.5          |
| France               | 219                     | 1.4          |
| Canada               | 46                      | 0.3          |
| United Arab Emirates | 53                      | 0.3          |
| Bahrain              | 13                      | 0.1          |
| Kuwait               | 4                       | 0.0          |
| Germany              | 1                       | 0.0          |
| Saudi Arabia         | 1                       | 0.0          |
| <b>Total</b>         | <b>15,922</b>           | <b>100.0</b> |

Source : ANAPEC, 2018

Table A4.8: Distribution of beneficiaries of international mediation by sector of activity

| Sector of activity       | Number of beneficiaries | Percent       |
|--------------------------|-------------------------|---------------|
| Agriculture              | 15,399                  | 96.7%         |
| Education                | 323                     | 2.0%          |
| Large-scale distribution | 90                      | 0.6%          |
| Hotels and restaurants   | 47                      | 0.3%          |
| Transport                | 28                      | 0.2%          |
| Secured                  | 10                      | 0.1%          |
| Retail business          | 9                       | 0.1%          |
| NTIC                     | 6                       | 0.0%          |
| Hairdressing             | 4                       | 0.0%          |
| Banking                  | 3                       | 0.0%          |
| Construction             | 1                       | 0.0%          |
| Automobile               | 1                       | 0.0%          |
| Computer science         | 1                       | 0.0%          |
| <b>Total</b>             | <b>15922</b>            | <b>100.0%</b> |

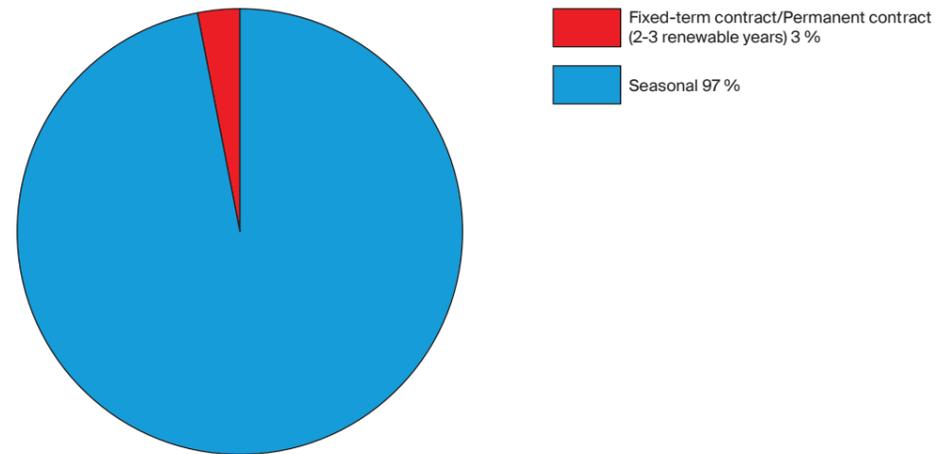
Source : ANAPEC, 2018

62 This population is represented by regularised migrants and refugees with cards conferring this status.

**Table A4.9: Distribution of beneficiaries of international mediation by type of contract**

| Type of contract   | Percentage of beneficiaries |
|--|-----------------------------|
| Seasonal   | 97%                         |
| Fixed-term contract/permanent contract (2-3 renewable years) | 3%                          |

Source: ANAPEC, 2018

**Figure A4.10: Distribution of beneficiaries of international mediation by type of contract**

Source: ANAPEC, 2018

# IV. Tunisia

Since the 1980s, the Tunisian government, via the ANETI, has attempted to tackle youth unemployment through the development of many ALMPs. These programmes represent the principal instrument used by the public authorities to facilitate the transition of jobseekers from unemployment to the labour market. For that reason, substantial financial resources have been devoted to promoting employment under ALMPs. The annual budget devoted to those programmes was TND 250–270 million in the period 1997–2006 (i.e. 0.8% of GDP), and reached TND 611 million in 2012 (Zouari 2014).

Table A4.11 : Summary of the main active labour market programmes provided by ANETI in Tunisia.

|   | Objective   | Targeting and duration   | Benefits provided by state   | Number Of beneficiaries            |
|---|---|--|--|------------------------------------|
| <b>Karama</b>   | To encourage private sector firms to recruit first-time job seekers with higher education qualifications.   | Tunisian first-time job seekers (registered with ANETI) or holders of a higher education diploma or an equivalent diploma or a BTS and having been unemployed for at least two years from the date of obtaining the last diploma. Duration: 24 months. | 50% of wages of newly hired employees for two years, up to TD 400 per month. Payment of the employer's contribution to the statutory social security system for two years, up to TD 600 per month. | 34,968 in 2018.                    |
| <b>CIDES : Contrat d'insertion des diplômés de l'enseignement supérieur</b> | To help beneficiaries obtain professional skills by alternating between a private company and a public or private training programme agreed on by the beneficiary, the company and ANETI.                       | Graduates of higher education who have been unemployed for more than two years since obtaining their diploma. Duration: 12 months.   | Stipend of TD 150 per month, A grant of up to TD 50 for those coming from another governorate. Training costs (400 hours maximum)  | 109 in 2018 and 3996 in 2010.      |
| <b>CIVP : Contrat d'initiation à la vie professionnelle</b>                 | To help beneficiaries acquire professional skills to facilitate their integration into the workforce in the private or public sector.   | Tunisian first-time jobseekers, university graduates or equivalent. Duration: up to 24 months including one or two 12-month internships in different companies.  | Stipend of TD 200 per month for university graduates or BTS and TD 150 per month for other levels. Social security payment<br>Training costs (400 hours maximum)                                   | 61,677 in 2018 and 45,245 in 2010. |
| <b>CAIP : Contrat d'adaptation et d'insertion professionnelle</b>           | To help beneficiaries obtain professional skills to meet the requirements of a job offer from a private company for a job that cannot be filled due to unavailability of suitable workers in the labour market. | Unemployed people with no higher education. Duration: 12-month internship.   | Stipend of TD 100 per month, social security coverage. Training costs (400 hours maximum).   | 41,333 in 2018 and 34,954 in 2010. |

|   |   |   |  |                                   |
|---|---|---|--|-----------------------------------|
| <b>CRVA : Contrat de réinsertion dans la vie active</b> | To allow workers who have lost their jobs to acquire new skills, meeting the requirements of a job offer previously identified in a private company.  | Permanent or temporary workers, with at least three years' experience in the same company, who lost their job for economic or technical reasons or as a result of the sudden, final, and illegal closing of the company they worked for.  | Stipend of TD 200 per month.<br>Social security payment.<br>Training costs (200 hours maximum). Up to 30% of transportation costs. | 101 in 2018 and 750 in 2010.      |
| <b>CSC : Contrat Service Civil</b>                      | To provide higher education graduates who are first-time jobseekers with an activity enabling them to develop their skills and competences and to acquire practical abilities facilitating their integration into working life in paid employment or self-employment. | Tunisian first-time jobseekers, holders of a higher education diploma or equivalent and who have been unemployed for more than 12 months from the date of obtaining the last diploma. Duration: up to 24 months including one or two 12-month internships in different companies. | Stipend of TD 200 per month,<br>Social security payment<br>Training costs (400 hours maximum)                                      | 20,964 in 2018 and 5,901 in 2010. |

The majority of ALMPs are tailored to young graduates (World Bank 2014c). For example:

- The Karama Programme, launched in 2017, aims to facilitate the integration into working life of first-time jobseekers with higher education qualifications (two-year employment contract with partial payment by the government).
- The Internship for Initiation into Professional Life (SIVP) promotes the employability of first-time jobseekers by allocating an internship grant to higher education graduates. In 2016, more than 43,000 of them benefited from such an allowance.
- The Contrat d'Insertion des Diplômés de l'Enseignement Supérieur (CIDES), provides support for higher education graduates in long-term unemployment (more than 3 years).

Employment policy in Tunisia also involves the promotion of self-employment: the Program d'Accompagnement des Promoteurs des Petites Entreprises (PAPPE) assists young people in the formulation and implementation of their entrepreneurial project. As such, the programme offers different types of support for business creation including entrepreneurial training, practical internships in companies, and support grants. More than 13,000 young people will have benefited from this in 2018 (ANETI 2018).<sup>63</sup>

# Annexe 5: Migration trends and governance in EJMT

## I. Egypt

### A History of Egyptian migration

The history of Egyptian migration dates back to the 19th century. However, systematic and organised migration began with the migration mainly to Iraq in the 1930s. The mid-1950s marked the beginning of Egyptian awareness of the role of migration as a labour distress mechanism. Waves of permanent migration from Egypt started in the mid 1960s, mainly for economic reasons, but also for political ones, with the large majority of the migrants going to the Gulf States. As early as the 1970s, the Egyptian Government came to regard emigration as a means to ease pressure on the Egyptian labour market. From the 1980s onwards, migration has been regarded as a tool for development. The government further eased migration procedures to increase remittances necessary to supply payment deficits – a strategy that was successful. Remittances are among Egypt's largest source of foreign currency.

Egyptian labour migration can be classified in two systems. The first and most dominant system is the one linking Egyptian migrant workers to the labour markets of countries in the Gulf Cooperation Council (GCC). Egyptian migrant workers also go to Jordan, Libya, and Lebanon; high numbers are found in Jordan and Libya but significantly less in Lebanon. The second system refers to the Egyptian labour force migrating to countries in the Organisation of Economic Cooperation and Development (OECD). In particular, within the OECD countries, European countries receive the highest percentage of Egyptian migrant workers. Countries in America and Oceania also host Egyptian migrant workers but in very low numbers.<sup>64</sup>

It was projected that after the Egyptian Revolution/uprisings of 2011, the political changes and the economic downturn would lead to large flows of migrant workers. This was especially dominant within the views of European countries who were expecting the generation of large flows of Egyptian migrants to their labour markets. Despite the assumption being conceptually sound at the time, it proved to be unjustified. By and large, the major determinants of Egyptian labour migration flows have not changed drastically since the 2011 uprisings. The issues that faced Egyptian labour migration remained largely the same. The changes that took place occurred due to political factors in the GCC, Libya, and Jordan. The Libyan uprisings have led to the return of a considerable number of Egyptian migrant workers working in the country. The influx of Syrian refugees into Jordan influenced the demand on Egyptian migrant workers. The internal economic and political turbulence in the GCC countries also influenced Egyptian labour migrants as well as those of other nationalities. Even in Europe, southern European countries were faced with economic and employment crises which were reflected in the reduced absorption of Egyptian workers.

### B International migration stock

Historically, Egypt was a land of immigrants, not emigrants (Sell, 1988). Egypt has been an area of international migration (migration from the eastern and the north-eastern Mediterranean countries to Egypt). In the past, foreigners came to Egypt while Egyptians rarely migrated abroad until the mid-1950s. The ancestors of the Egyptian people include many races and ethnic groups, including Africans, Arabs, Berbers, Greeks, Persians, Romans, and Turks

#### Stocks of international migrants

As per United Nations estimates (in Table A5.1 below), Egypt hosts 504,000 international migrants. Palestinians, Syrians, and Sudanese together represent 63 percent of the international migration stock in Egypt. Other primary nationalities include Somalis, Iraqis and South Sudanese. Egypt hosts a large number of immigrants, as claimed

<sup>64</sup> Egyptian permanent migrants in North America and Oceania are estimated to be equal in numbers to temporary Egyptian migrant workers in Europe.

by the Egyptian Government. In vague terms, the government considers all non-citizens to be refugees. In his speech at the United Nations Summit for Refugees and Migrants in September 2016, Mr Abdel-Fattah el Sisi, President of Egypt, declared that Egypt is host to five million refugees.<sup>65</sup>

Table A5.1: **International migrants in Egypt by nationality and gender, 2019**  
United Nations estimate

| Major source countries | Male           |              | Female         |              | Total          |
|------------------------|----------------|--------------|----------------|--------------|----------------|
|                        | Number         | Percent      | Number         | Percent      |                |
| Palestine              | 78,130         | 58.3%        | 55,950         | 41.7%        | 134,080        |
| Syria                  | 61,506         | 49.3%        | 63,182         | 50.7%        | 124,688        |
| Sudan                  | 31,441         | 53.0%        | 27,836         | 47.0%        | 59,277         |
| Somalia                | 11,851         | 58.6%        | 8,381          | 41.4%        | 20,232         |
| Iraq                   | 8,723          | 44.1%        | 11,056         | 55.9%        | 19,779         |
| South Sudan            | 7,073          | 53.0%        | 6,263          | 47.0%        | 13,336         |
| Saudi Arabia           | 5,208          | 64.1%        | 2,922          | 35.9%        | 8,130          |
| Germany                | 4,192          | 54.7%        | 3,477          | 45.3%        | 7,669          |
| Russia                 | 2,899          | 39.0%        | 4,538          | 61.0%        | 7,437          |
| UAE                    | 3,257          | 54.3%        | 2,739          | 45.7%        | 5,996          |
| Yemen                  | 3,401          | 60.1%        | 2,256          | 39.9%        | 5,657          |
| Jordan                 | 2,883          | 55.4%        | 2,325          | 44.6%        | 5,208          |
| Libya                  | 2,806          | 56.3%        | 2,175          | 43.7%        | 4,981          |
| Ethiopia               | 2,174          | 44.1%        | 2,753          | 55.9%        | 4,927          |
| Eritrea                | 1,991          | 44.1%        | 2,524          | 55.9%        | 4,515          |
| Italy                  | 2,226          | 53.6%        | 1,925          | 46.4%        | 4,151          |
| Lebanon                | 1,415          | 44.8%        | 1,740          | 55.2%        | 3,155          |
| United Kingdom         | 1,698          | 54.4%        | 1,423          | 45.6%        | 3,121          |
| Other countries        | 38,174         | 56.4%        | 29,540         | 43.6%        | 67,714         |
| <b>Total</b>           | <b>271,048</b> | <b>53.8%</b> | <b>233,005</b> | <b>46.2%</b> | <b>504,053</b> |

Source: Author's own calculations based on UN figures (2019)

65 Speech by President Sisi at the UN Summit on Migrants and Refugees, New York, September 2016, <https://www.youtube.com/watch?v=2lQiuPHcGSo>, 30.11.2019.

Despite this affirmation, the results of Egypt's population census of 2017 announced in September 2017 did not include non-citizens (CAPMAS, 2017). The 2017 census data was published for Egyptians only. No formal reason was given for not publishing non-citizen data.

### Asylum seekers and refugees

In 1951, Egypt was, together with Turkey, the only non-western member of the drafting committee of the UN Convention on Refugees. UNHCR established its office in Egypt in 1954. At the time of ratifying the 1951 convention, Egypt entered reservations to the following articles, making them inapplicable in Egypt: Articles 12.1, 20, 23 and 24. These cover personal status, unequal treatment of refugees compared to nationals if there is a rationing system in Egypt, and access to public relief. Article 24 on employment has the greatest impact on refugee populations living in Egypt. It makes them unable to join the formal labour force. Most of them are absorbed by the informal labor market even so.

As shown in Table A5.2 below, the number of refugees and asylum seekers in Egypt increased from 114,850 in 2011 to 314,856 in 2018. As for the composition of the asylum seekers and refugees in 2018 by country, it is noticeable that Syrians comprise more than 40 percent of the total population (42.2 percent) followed by Palestinians who comprise 22.2 percent. Sudanese rank third with 13.3 percent of the total refugee population. Other primary nationalities are Ethiopians, Eritreans, South Sudanese, Yemenis, Somalis, and Iraqis.

Table A5.2: **Number of refugees and asylum seekers in Egypt (2011–2018)**

|         | Country |           |        |          |         |             |       |         |       |                     | Total   |
|---------|---------|-----------|--------|----------|---------|-------------|-------|---------|-------|---------------------|---------|
|         | Syria   | Palestine | Sudan  | Ethiopia | Eritrea | South Sudan | Yemen | Somalia | Iraq  | Other Nationalities |         |
| 2011    | 94      | 70,049    | 24,750 | 1,436    | 1,917   |             | 256   | 7,168   | 7,436 | 919                 | 114,850 |
| 2012    | 12,836  | 70,063    | 22,788 | 2,206    | 2,232   | 942         | 327   | 7,437   | 6,795 | 1,259               | 126,885 |
| 2013    | 131,659 | 70,057    | 26,415 | 3,128    | 2,873   | 1,817       | 404   | 8,097   | 6,989 | 1,806               | 253,245 |
| 2014    | 138,381 | 70,041    | 26,727 | 4,212    | 2,735   | 3,009       | 413   | 7,365   | 6,872 | 1,966               | 261,721 |
| 2015    | 117,635 | 70,026    | 28,612 | 6,931    | 3,836   | 4,147       | 1,382 | 7,682   | 7,191 | 3,229               | 250,671 |
| 2016    | 116,013 | 70,032    | 33,128 | 12,029   | 7,132   | 5,641       | 2,640 | 7,027   | 7,492 | 2,273               | 263,407 |
| 2017    | 126,688 | 70,019    | 35,737 | 14,452   | 12,693  | 10,077      | 4,585 | 6,647   | 6,663 | 1,670               | 289,231 |
| 2018    | 132,871 | 70,021    | 41,771 | 15,931   | 15,442  | 14,622      | 8,322 | 7,164   | 6,994 | 1,718               | 314,856 |
| Percent | 42.2    | 22.2      | 13.3   | 5.1      | 4.9     | 4.6         | 2.6   | 2.3     | 2.2   | 0.5                 | 100     |

Source: UNHCR database

### Regular labour immigrants

According to the Egyptian labour regulations, the number of non-Egyptian employees in any establishment must not exceed 10 percent of the total workforce of low-skilled or semi-skilled workers. For skilled workers, the limit of foreign labour is 25 percent. Foreigners interested in employment in Egypt must obtain work permits and follow the corresponding regulations issued by the Ministry of Manpower and Migration in this regard. After a work permit is obtained, the foreign national's visa (whether tourist or temporary) is converted into a work visa, with the same duration as the work permit. Work permits are easier to obtain for technical staff than for low-skilled or semi-skilled workers.

According to the statistics of regular foreign workers in Egypt, formal/regular labour migration in the country comprises a very small fraction of the estimated number of non-citizens in Egypt. As shown in Table A5.3 below, the total number of regular foreign workers in Egypt in the governmental sector and the private sector increased from 13,486 in 2014 to 14,777 in 2018. Foreign workers in the government and public sector comprised less than 10 percent of the regular foreign labour force in Egypt.

Table A5.3: Foreign workers in the public and private sectors in Egypt 2014–2018

| Year | Government and public sector | Private sector | Total  |
|------|------------------------------|----------------|--------|
| 2014 | 560                          | 13,486         | 14,046 |
| 2015 | 850                          | 13,896         | 14,746 |
| 2016 | 889                          | 14,045         | 14,934 |
| 2017 | 1,132                        | 13,469         | 14,601 |
| 2018 | 975                          | 14,777         | 15,752 |

Source: CAPMAS, 2019

Due to the relatively small percentage of foreigners working in the governmental sector, successive analysis sheds some light on the composition of foreigners working in the private sector in 2018. Foreign workers in Egypt by country of origin in 2018 are given in Table A5.4 below. As shown in the table, about 50 percent of the (regular) foreign labour force in Egypt comes from five countries; Bangladesh (11.1 percent), the Philippines (10.2 percent), India (9.7 percent), Palestine (8.0 percent), and Syria (7.3 percent). As for the main occupational groups of foreign labour in Egypt, technicians and associate professionals comprise 33.1 percent of foreign labour followed by legislators, senior officials and managers (24.4 percent). Professional occupations rank third with 23.2 percent of foreign labour in Egypt. For more details, see Table A5.5 below.

Table A5.4: Foreign workers by country of origin, Egypt 2018

| Country         | Number of workers | Percent      |
|-----------------|-------------------|--------------|
| Bangladesh      | 1,641             | 11.1         |
| Philippines     | 1,504             | 10.2         |
| India           | 1,431             | 9.7          |
| Palestine       | 1,177             | 8.0          |
| Syria           | 1,076             | 7.3          |
| UK              | 957               | 6.5          |
| China           | 655               | 4.4          |
| Italy           | 549               | 3.7          |
| Turkey          | 529               | 3.6          |
| USA             | 524               | 3.5          |
| Germany         | 521               | 3.5          |
| France          | 366               | 2.5          |
| Lebanon         | 334               | 2.3          |
| Canada          | 295               | 2.0          |
| Pakistan        | 229               | 1.5          |
| Thailand        | 210               | 1.4          |
| Russia          | 201               | 1.4          |
| Ukraine         | 200               | 1.4          |
| Australia       | 142               | 1.0          |
| Sri Lanka       | 109               | 0.7          |
| Sudan           | 101               | 0.7          |
| Korea           | 100               | 0.7          |
| Other countries | 1,926             | 13.0         |
| <b>Total</b>    | <b>14,777</b>     | <b>100.0</b> |

Source: CAPMAS (2019)

Table A5.5: Foreign workers by main occupation, Egypt 2018

| Main occupation                                   | Number        | Percent      |
|---|---------------|--------------|
| Legislators, senior officials and managers        | 3,605         | 24.4         |
| Professionals                                     | 3,426         | 23.2         |
| Technicians and associate professionals           | 4,890         | 33.1         |
| Clerks  | 214           | 1.4          |
| Service workers and shop and market sales workers | 276           | 1.9          |
| Skilled agricultural and fishery workers          | 218           | 1.5          |
| Craft and related trades workers                  | 405           | 2.7          |
| Plant and machine operators and assemblers        | 1,570         | 10.6         |
| Elementary occupations                            | 173           | 1.2          |
| <b>Total</b>                                      | <b>14,777</b> | <b>100.0</b> |

Source: CAPMAS (2019)

### Irregular labour immigrants

Foreigners include mixed migration, regular labour migrants, irregular migrants, asylum seekers, refugees, and others. Others include mainly Sudanese who are allowed to stay in the country in accordance with the agreement between Egypt and the Sudan called the Four Freedoms Agreement concluded between the Government of Egypt and the Government of Sudan in April 2004. This agreement grants both Sudanese and Egyptians the freedom of movement, residence, ownership and work in either country. The Others category also includes Syrians who live in Egypt without being registered under the mandate of the UNHCR.

## Migrants worldwide: Emigration

There are different estimates for the number of Egyptians abroad. While national estimates put the number of Egyptians abroad at up to 10.25 million in 2017, the United Nations estimates of Egyptians abroad downsized the number to 3.2 million in 2017 and 3.6 million in 2019 (United Nations, 2019). According to official figures shown in Table A5.6, it can be seen that Egyptian migration is mainly labour migration to Arab countries with about 68 percent of Egyptians migrants abroad based in the Arab Gulf countries and other Arab countries. Saudi Arabia, Jordan, Kuwait, the United Arab Emirates (UAE), and Qatar are the main destinations of Egyptians in the Arab region. Egyptians in the non-Arab countries comprise about 32 percent of Egyptians abroad.<sup>66</sup> The United States of America, Canada, Italy, the United Kingdom (UK), Australia, Greece, France, Germany, Austria, and Netherlands are the main destinations of Egyptians abroad from the Arab region.

In addition to the national estimates presented in Table A5.6 below, and due to the major discrepancy between the national estimates (10,247,303 Egyptians abroad) and the United Nations estimates (3,547,626 Egyptians abroad), the United Nation estimates are presented in Table A5.7 for comparability with other countries.

<sup>66</sup> This percentage includes second and third generation Egyptians abroad.

Table A5.6: Egyptians abroad by region and country of destination 2017<sup>67</sup>

| Recipient country              | Number of migrants (stock) | Distribution by destination for Arab countries and non-Arab countries (%) | Overall distribution (%) |
|--------------------------------|----------------------------|---|--------------------------|
| Arab countries                 |                            |   |                          |
| Saudi Arabia                   | 3,500,000                  | 49.9%   | 34.2%                    |
| Jordan                         | 1,250,000                  | 17.8%   | 12.2%                    |
| UAE                            | 982,370                    | 14.0%   | 9.6%                     |
| Kuwait                         | 700,000                    | 10.0%   | 6.8%                     |
| Qatar                          | 250,000                    | 3.6%  | 2.4%                     |
| Sudan                          | 151,400                    | 2.2%  | 1.5%                     |
| Oman                           | 60,000                     | 0.9%  | 0.6%                     |
| Lebanon                        | 40,000                     | 0.6%  | 0.4%                     |
| Bahrain                        | 23,000                     | 0.3%  | 0.2%                     |
| Libya/Yemen                    | --                         | --  | --                       |
| Other Arab countries           | 50,820                     | 0.7%  | 0.5%                     |
| Total for Arab countries       | 7,007,590                  | 100.0%  | 68.4%                    |
| Non-Arab countries             |                            |   |                          |
| USA                            | 1,131,000                  | 34.9%   | 11.0%                    |
| Canada                         | 700,500                    | 21.6%   | 6.8%                     |
| Italy                          | 400,000                    | 12.3%   | 3.9%                     |
| France                         | 366,000                    | 11.3%   | 3.6%                     |
| Australia                      | 285,000                    | 8.8%  | 2.8%                     |
| UK                             | 65,000                     | 2.0%  | 0.6%                     |
| Germany                        | 55,000                     | 1.7%  | 0.5%                     |
| South Africa                   | 40,000                     | 1.2%  | 0.4%                     |
| Austria                        | 33,000                     | 1.0%  | 0.3%                     |
| Netherlands                    | 23,000                     | 0.7%  | 0.2%                     |
| Greece                         | 35,000                     | 1.1%  | 0.3%                     |
| Other non-Arab countries       | 106,213                    | 3.3%  | 1.0%                     |
| Total for non-Arab countries   | 3,239,713                  | 100.0%  | 31.6%                    |
| <b>Total for all countries</b> | <b>10,247,303</b>          |   | <b>100.0%</b>            |

Source : CAPMAS 2019 based on estimates from the Ministry of Foreign Affairs.

Table A5.7: Egyptians abroad by major recipient country and gender, 2019  
United Nations estimates

| Major recipient country  | Male      |         | Female    |         | Total     |
|--------------------------|-----------|---------|-----------|---------|-----------|
|                          | Number    | Percent | Number    | Percent |           |
| Saudi Arabia             | 643,861   | 68.6%   | 294,788   | 31.4%   | 938,649   |
| United Arab Emirates     | 592,561   | 66.9%   | 293,730   | 33.1%   | 886,291   |
| Kuwait                   | 237,595   | 57.8%   | 173,236   | 42.2%   | 410,831   |
| United States of America | 105,752   | 52.0%   | 97,453    | 48.0%   | 203,205   |
| Qatar                    | 148,336   | 79.4%   | 38,504    | 20.6%   | 186,840   |
| Italy                    | 86,076    | 70.5%   | 35,964    | 29.5%   | 122,040   |
| Jordan                   | 68,306    | 65.0%   | 36,778    | 35.0%   | 105,084   |
| Bahrain                  | 55,238    | 64.9%   | 29,904    | 35.1%   | 85,142    |
| Oman                     | 60,036    | 70.6%   | 25,004    | 29.4%   | 85,040    |
| Lebanon                  | 37,691    | 47.9%   | 41,051    | 52.1%   | 78,742    |
| Canada                   | 36,211    | 52.8%   | 32,360    | 47.2%   | 68,571    |
| Australia                | 25,421    | 52.5%   | 22,961    | 47.5%   | 48,382    |
| United Kingdom           | 22,035    | 55.7%   | 17,558    | 44.3%   | 39,593    |
| France                   | 21,085    | 61.9%   | 12,979    | 38.1%   | 34,064    |
| Greece                   | 15,483    | 56.2%   | 12,066    | 43.8%   | 27,549    |
| Libya                    | 15,836    | 71.1%   | 6,450     | 28.9%   | 22,286    |
| Germany                  | 15,464    | 71.6%   | 6,127     | 28.4%   | 21,591    |
| Other countries          | 108,314   | 59.0%   | 75,412    | 41.0%   | 183,726   |
| Total                    | 2,295,301 | 64.7%   | 1,252,325 | 35.3%   | 3,547,626 |

Source: United Nations (2019)

67 The 10 million is a figure announced by the government of Egypt, whose source is the Ministry of Foreign Affairs.

### Work permits issued for Egyptians to work abroad

Reducing the focus on labour migration may give the reader an idea of the volume and characteristics of labour migration from Egypt. Table B3.8 below shows the latest data available on total work permits issued for Egyptians to work abroad by country of destination, education, type of contract and gender. Work permits are issued by the Ministry of Interior in order to ensure that Egyptians who have a criminal past are not employed with any foreign entity in order to preserve the country's reputation as well as to ensure that Egyptians do not work with foreign entities engaging in activities hostile to the interests of the nation and its citizens. The added value of work permits is the fact that they are considered a reliable administrative source of data on migration streams from Egypt.

As shown in Table A5.8, the total number of work permits issued in 2018 was 1,078,254; 97.4 percent of them were issued to men, while only 2.6 percent were issued for women, which confirms that men have far greater access to regular labour migration opportunities than women do. As for the distribution of work permits by country of destination, it is noted that work permits issued for Egyptians to work in Saudi Arabia comprise about 50 percent of the total number of work permits issued in 2018 (515,034 work permits). With respect to the distribution of work permits by education, it is noted that 42.9 percent of the labour migrants are educated at secondary level, compared to 29.5 percent with a university education and almost the same percentage with no certificate (27.6 percent). As for the type of contract, an individual contract is the main type of contractual relationship with 93.1 percent of the population.

Table A5.8: Work permits issued for Egyptians to work abroad in 2018 by country of destination, education, type of contract and gender

| Country              | Education       |                |                   | Type of contract       |                 |                         | Gender    |        | Total     | %      |
|----------------------|-----------------|----------------|-------------------|------------------------|-----------------|-------------------------|-----------|--------|-----------|--------|
|                      | Univer-<br>sity | Second-<br>ary | No certi-<br>cate | Individual<br>contract | Second-<br>ment | Leave<br>without<br>pay | M         | F      |           |        |
| KSA                  | 165,971         | 209,313        | 139,750           | 476,054                | 3,660           | 35,320                  | 505,672   | 9,362  | 515,034   | 47.8%  |
| Kuwait               | 65,794          | 102,060        | 62,949            | 214,266                | 1,632           | 14,905                  | 221,592   | 9,211  | 230,803   | 21.4%  |
| Jordan               | 6,059           | 64,501         | 55,201            | 125,074                | 18              | 669                     | 125,519   | 242    | 125,761   | 11.7%  |
| UAE                  | 41,966          | 40,548         | 17,632            | 92,890                 | 1,052           | 6,204                   | 95,182    | 4,964  | 100,146   | 9.3%   |
| Qatar                | 16,058          | 14,723         | 7,033             | 34,802                 | 207             | 2,805                   | 36,363    | 1,451  | 37,814    | 3.5%   |
| Italy                | 4,129           | 9,111          | 4,168             | 16,590                 | 3               | 815                     | 17,387    | 21     | 17,408    | 1.6%   |
| Lebanon              | 904             | 8,201          | 3,960             | 12,920                 | 45              | 100                     | 13,031    | 34     | 13,065    | 1.2%   |
| Oman                 | 8,273           | 4,022          | 2,041             | 9,739                  | 650             | 3,947                   | 12,524    | 1,812  | 14,336    | 1.3%   |
| Bahrain              | 4,109           | 2,737          | 1,590             | 6,599                  | 224             | 1,613                   | 7,819     | 617    | 8,436     | 0.8%   |
| Greece               | 108             | 716            | 864               | 1,669                  | 0               | 19                      | 1,685     | 3      | 1,688     | 0.2%   |
| Other coun-<br>tries | 2,181           | 3,897          | 2,546             | 8,121                  | 127             | 376                     | 8,560     | 64     | 8,624     | 0.8%   |
| Int'l Ships          | 2,364           | 2,415          | 360               | 5,134                  | 3               | 2                       | 5,113     | 26     | 5,139     | 0.5%   |
| Total                | 317,916         | 462,244        | 298,094           | 1,003,858              | 7,621           | 66,775                  | 1,050,447 | 27,807 | 1,078,254 | 100.0% |
| Percent              | 29.5%           | 42.9%          | 27.6%             | 93.1%                  | 0.7%            | 6.2%                    | 97.4%     | 2.6%   | 100.0%    |        |

Source: CAPMAS (2019)

# II. Jordan

A

## History of Jordanian migration

The history of Jordanian migration can be traced back to the 1950s when Jordanians started to migrate to the Arab Gulf states to work, mainly in the education and petroleum industries. Due to the increasing demands on the labour force in the Arab Gulf States after the rise on oil prices between 1973/74 and 1979/80, the number of migrants from Jordan to the GCC countries has increased gradually. The migration of Jordanians was not limited to the Arab Gulf States, but it extended to other countries outside the Arab world, especially to Germany, the United Kingdom, the United States of America and some South American countries.

As for migration to Jordan, this started mainly as refugee streams from Palestine after the 1948 Arab-Israeli War. Streams of refugees from Palestine to Jordan continued after the war in 1967. The Palestinian refugees in Jordan have played a key role in the country's politics, economy, demographic composition and society. After the American-led invasion of Iraq, Jordan was the main destination for Iraqi refugees. The same happened with Syrians after March 2011's political unrest in Syria. Due to its history as a destination for refugees, some scholars consider Jordan to be a refugee haven (Chatelard, 2011). Since a great deal of refugees are able to join the labour market in Jordan, the differentiation between labour migration and refugee workers is difficult, especially after permitting Syrian refugees to work in some economic sectors without work permits from the Ministry of Labour.

B

## International migration stock

Jordan hosts about three million international migrants. Except for Egyptians and a small percentage of South and Southeast Asian labour migrants, most of the international migrants in Jordan nowadays are asylum seekers and refugees. Non-Jordanians comprise about 30% of the total population in Jordan, one of the highest percentages of non-citizens in the region other than the Arab Gulf States.

### Stocks of international migrants

According to United Nations estimates, Jordan hosts about 3.4 million international migrants. As shown in Table A5.9 below, Palestinians and Syrians represent about 85 percent of international migrants in Jordan. Other primary nationalities include Iraqis and Egyptians. The influx of Syrians to Jordan increased dramatically after the start of the political unrest in Syria in March 2011. As a country bordering on Syria, along with Lebanon, Turkey and Iraq, Jordan received a significant share of Syrian refugees escaping to neighbouring countries. The current estimate for the number of Syrians in Jordan is about 1.3 million. About 50 percent of Syrians in Jordan are registered as refugees with the UNHCR (2019).

Table A5.9: **International migrants in Jordan by nationality and gender, 2019**  
United Nations Estimates

| Major source countries | Male             |              | Female           |              | Total            |
|------------------------|------------------|--------------|------------------|--------------|------------------|
|                        | Number           | Percent      | Number           | Percent      |                  |
| Palestine              | 1,057,069        | 49.9%        | 1,061,198        | 50.1%        | 2,118,267        |
| Syria                  | 362,255          | 50.0%        | 362,253          | 50.0%        | 724,508          |
| Iraq                   | 111,103          | 52.0%        | 102,555          | 48.0%        | 213,658          |
| Egypt                  | 68,306           | 65.0%        | 36,778           | 35.0%        | 105,084          |
| Yemen                  | 18,483           | 60.0%        | 12,322           | 40.0%        | 30,805           |
| China                  | 5,589            | 25.8%        | 16,080           | 74.2%        | 21,669           |
| Libya                  | 13,188           | 65.0%        | 7,100            | 35.0%        | 20,288           |
| Indonesia              | 3,485            | 17.7%        | 16,242           | 82.3%        | 19,727           |
| Sri Lanka              | 1,049            | 8.1%         | 11,974           | 91.9%        | 13,023           |
| Bangladesh             | 8,628            | 71.2%        | 3,497            | 28.8%        | 12,125           |
| India                  | 5,364            | 87.0%        | 801              | 13.0%        | 6,165            |
| Sudan                  | 3,064            | 55.0%        | 2,506            | 45.0%        | 5,570            |
| Saudi Arabia           | 3,505            | 66.7%        | 1,747            | 33.3%        | 5,252            |
| Philippines            | 248              | 6.2%         | 3,761            | 93.8%        | 4,009            |
| Pakistan               | 1,981            | 58.4%        | 1,414            | 41.6%        | 3,395            |
| USA                    | 1,512            | 55.4%        | 1,218            | 44.6%        | 2,730            |
| Lebanon                | 833              | 43.5%        | 1,084            | 56.5%        | 1,917            |
| Other countries        | 19,696           | 51.1%        | 18,815           | 48.9%        | 38,511           |
| <b>Total</b>           | <b>1,685,358</b> | <b>50.4%</b> | <b>1,661,345</b> | <b>49.6%</b> | <b>3,346,703</b> |

Source: United Nations (2019)

At the time of the last population census in Jordan, Egyptians in Jordan comprised the second major nationality after Syrians (See Table A5.10 for details). According to Jordanian statistics, the number of Egyptians is estimated to be 636,000. They comprise about 22 percent of foreigners in Jordan. As for the gender composition of Egyptians in Jordan, it can be seen that 82 percent of Egyptians are males while only 18 percent are females. This may be attributable to the fact that Egyptian labour migration to Arab countries primarily involves males, as well as to the fact that Egyptian migrants to Jordan are mainly semi-skilled young males who usually migrate as individuals (Zohry et al., 2020).

Palestinian refugees in Jordan are well-documented since the 1948 Arab-Israeli War. Palestinians ranked as the third largest foreign nationality in Jordan. They comprise 22 percent of the total foreign population in Jordan, the same as Egyptians. However, Palestinians in Jordan have greater female representation than Egyptians, with females representing about 38 percent of Palestinians in Jordan. Other nationalities residing in Jordan are mainly linked to conflict and political unrest in the region. These nationalities include Iraqis, Yemenis and Libyans. Refugees comprise more than 85 percent of the foreign population in Jordan.

Table A5.10: **Non-Jordanians in Jordan, 2015 population census**

| Nationality                 | Gender           |                  | Total            | Percent       |
|-----------------------------|------------------|------------------|------------------|---------------|
|                             | Male             | Female           |                  |               |
| Syrians                     | 628,226          | 637,288          | 1,265,514        | 43.4%         |
| Egyptians                   | 523,634          | 112,636          | 636,270          | 21.8%         |
| Palestinians                | 349,062          | 285,120          | 634,182          | 21.7%         |
| Iraqis                      | 66,019           | 64,892           | 130,911          | 4.5%          |
| Yemenis                     | 18,756           | 12,407           | 31,163           | 1.1%          |
| Libyans                     | 13,575           | 9,125            | 22,700           | 0.8%          |
| Other nationalities         | 79,510           | 117,875          | 197,385          | 6.8%          |
| <b>Total non-Jordanians</b> | <b>1,678,782</b> | <b>1,239,343</b> | <b>2,918,125</b> | <b>100.0%</b> |

Source: Department of Statistics (DoS), Jordanian 2015 Population Census.

#### Non-Jordanians in the Jordanian labour market

Despite the large number of international migrants in Jordan, the number of non-Jordanian workers holding work permits was only 352,000 in 2018. The low labour force participation rate is attributed to four main factors as follows:

First: Since about 85 percent of non-Jordanians in Jordan are refugees living in Jordan with their family members, their numbers usually include dependents and family members who are not part of the labour force. In addition, and theoretically speaking, the participation rate of refugees in the labour force is always low, either due to their dependence on aid or due to the restrictions imposed on them by the regulations in the host country.

Second: Among the refugees hosted by Jordan are refugees from Libya and Iraq who usually receive remittances from their relatives or have access to financial resources so that they may not be willing to join the labour force.

Third: As for Syrian refugees, they have been able to work legally with permits since 2016, yet their labour force participation rate remains very low.<sup>68</sup>

Fourth: Illegal work; those who work without work permits or stay in the labour market after the expiry of their work permits.

Number of non-Jordanian workers holding work permits by nationality, sex and economic activity are presented in Table A5.11 below. As shown in the table, the total number of work permits is 352,000. As mentioned above, they represent 27% of the total number of non-Jordanians. With respect to the nationality of work permit holders, Egyptians represent 53.6% of the total number; less than one percent are females. Among Arab nationals, Syrians rank second but their representation is much lower than Egyptians. They represent 11.5% only. Females represent less than five percent of the total number of Syrians holding work permits. Other Arab nationals represent only 2.5%.

As for non-Arab countries, most of the immigrants come from South and Southeast Asia. Bangladeshi migrants rank first among non-Arab migrants in Jordan. They comprise 12.1% of total immigrants followed by migrants from the Philippines, who represent five percent. Indians rank third with 4.4%, and Sri Lankans rank fourth with 2.7 percent. Pakistanis represent less than one percent of immigrants in Jordan.

As for the gender composition of non-Jordanian workers holding work permits, it can be seen that most of workers from Egypt and Syria are males; 99.4% for Egyptians and 95.1% for Syrians. Pakistani immigration is also predominantly masculine with 93.9% males. The Government of India placed restrictions on female work in

<sup>68</sup> For reasons mentioned in the first point.

Jordan, so males represent 96.1% of migrants in Jordan. As for Sri Lankans, males comprise 44.7% and females comprise 55.3% with the most balanced gender composition in the labour market. Females represent the vast majority of migrants from the Philippines in Jordan; they represent 95.2%. The percent of females is very high among Bangladeshi migrants (about 80%).

Moving to the economic activity of non-Jordanian workers holding work permits, it can be seen that more than 70% of migrant workers are absorbed into three main economic activities. Migrant workers in manufacturing comprise 25.9% followed by migrant workers in agriculture who represent 24.9%, then comes the third economic activity, social and personal services, which absorbs 20.3% of formal foreign labour. In addition to these three economic activities, the economic activities of construction and trade, restaurants and hotels absorb 24.3% of formal foreign labour.

As for the interactions between nationalities, gender, and economic activity, it can be seen that most of those who are working in agriculture are Egyptian and Syrian males. Pakistani males also work in agriculture in addition to manufacturing. The economic activities of construction and trade, restaurants and hotels are also dominated by Egyptian and Syrian males. Filipino females dominate social and personal services. Most of the Sri Lankan males and females work in manufacturing. In addition to working in social and personal services, Bangladeshi females work in manufacturing, mainly in the textile industry in the industrial zones in Irbid and other places. Indian males are also absorbed heavily into manufacturing.

Table A5.11: **Non-Jordanian workers holding work permits by nationality, gender and economic activity, Jordan 2018**

| Nationality        | Agriculture   | Mining & quarrying | Manufacturing | Electricity, gas & water | Construction  | Trade, restaurants & hotels |
|--------------------|---------------|--------------------|---------------|--------------------------|---------------|-----------------------------|
| <b>Egyptian</b>    |               |                    |               |                          |               |                             |
| Male               | 67,674        | 610                | 23,977        | 580                      | 27,749        | 33,939                      |
| Female             | 198           | 4                  | 156           | 4                        | 118           | 208                         |
| <b>Total</b>       | <b>67,872</b> | <b>614</b>         | <b>24,133</b> | <b>584</b>               | <b>27,867</b> | <b>34,147</b>               |
| <b>Syrian</b>      |               |                    |               |                          |               |                             |
| Male               | 15,304        | 27                 | 4,127         | 83                       | 11,264        | 6,069                       |
| Female             | 1,301         | 0                  | 240           | 6                        | 17            | 72                          |
| <b>Total</b>       | <b>16,605</b> | <b>27</b>          | <b>4,367</b>  | <b>89</b>                | <b>11,281</b> | <b>6,141</b>                |
| <b>Other Arabs</b> |               |                    |               |                          |               |                             |
| Male               | 388           | 48                 | 2,133         | 22                       | 163           | 2,285                       |
| Female             |               | 1                  | 29            | 0                        | 1             | 154                         |
| <b>Total</b>       | <b>388</b>    | <b>49</b>          | <b>2,162</b>  | <b>22</b>                | <b>164</b>    | <b>2,439</b>                |
| <b>Bangladesh</b>  |               |                    |               |                          |               |                             |
| Male               | 547           | 2                  | 7,387         | 5                        | 69            | 245                         |
| Female             | 1             | 0                  | 22,984        | 0                        | 0             | 6                           |
| <b>Total</b>       | <b>548</b>    | <b>2</b>           | <b>30,371</b> | <b>5</b>                 | <b>69</b>     | <b>251</b>                  |
| <b>Filipino</b>    |               |                    |               |                          |               |                             |
| Male               | 5             | 6                  | 127           | 0                        | 161           | 288                         |
| Female             | 0             | 0                  | 11            | 0                        | 6             | 386                         |
| <b>Total</b>       | <b>5</b>      | <b>6</b>           | <b>138</b>    | <b>0</b>                 | <b>167</b>    | <b>674</b>                  |
| <b>Indian</b>      |               |                    |               |                          |               |                             |
| Male               | 309           | 13                 | 12,703        | 360                      | 625           | 591                         |
| Female             | 5             | 0                  | 525           | 1                        | 2             | 3                           |
| <b>Total</b>       | <b>314</b>    | <b>13</b>          | <b>13,228</b> | <b>361</b>               | <b>627</b>    | <b>594</b>                  |
| <b>Sri Lankan</b>  |               |                    |               |                          |               |                             |
| Male               | 4             | 1                  | 4,052         | 1                        | 5             | 47                          |
| Female             | 0             | 0                  | 3,362         | 0                        | 0             | 4                           |
| <b>Total</b>       | <b>4</b>      | <b>1</b>           | <b>7,414</b>  | <b>1</b>                 | <b>5</b>      | <b>51</b>                   |
| <b>Pakistani</b>   |               |                    |               |                          |               |                             |
| Male               | 1,527         | 0                  | 933           | 2                        | 54            | 195                         |
| Female             | 51            | 0                  | 124           | 0                        | 0             | 3                           |
| <b>Total</b>       | <b>1,578</b>  | <b>0</b>           | <b>1,057</b>  | <b>2</b>                 | <b>54</b>     | <b>198</b>                  |
| <b>Others</b>      |               |                    |               |                          |               |                             |
| Male               | 22            | 4                  | 2,707         | 55                       | 309           | 630                         |
| Female             | 2             | 0                  | 5,512         | 1                        | 8             | 148                         |
| <b>Total</b>       | <b>24</b>     | <b>4</b>           | <b>8,219</b>  | <b>56</b>                | <b>317</b>    | <b>778</b>                  |
| <b>Total</b>       |               |                    |               |                          |               |                             |
| Male               | 85,780        | 711                | 58,146        | 1,108                    | 40,399        | 44,289                      |
| Female             | 1,558         | 5                  | 32,943        | 12                       | 152           | 984                         |
| <b>Total</b>       | <b>87,338</b> | <b>716</b>         | <b>91,089</b> | <b>1,120</b>             | <b>40,551</b> | <b>45,273</b>               |
| <b>Percent</b>     | <b>24.8%</b>  | <b>0.2%</b>        | <b>25.9%</b>  | <b>0.3%</b>              | <b>11.5%</b>  | <b>12.8%</b>                |

| Nationality        | Transport, storage & communications | Finance & business | Social & personal services | Other         | Total          | Percent       |
|--------------------|-------------------------------------|--------------------|----------------------------|---------------|----------------|---------------|
| <b>Egyptian</b>    |                                     |                    |                            |               |                |               |
| Male               | 1,884                               | 1,211              | 24,212                     | 6,078         | <b>187,914</b> | <b>99.4%</b>  |
| Female             | 13                                  | 16                 | 231                        | 100           | <b>1,048</b>   | <b>0.6%</b>   |
| <b>Total</b>       | <b>1,897</b>                        | <b>1,227</b>       | <b>24,443</b>              | <b>6,178</b>  | <b>188,962</b> | <b>53.6%</b>  |
| <b>Syrian</b>      |                                     |                    |                            |               |                |               |
| Male               | 182                                 | 87                 | 728                        | 656           | <b>38,527</b>  | <b>95.1%</b>  |
| Female             | 1                                   | 9                  | 108                        | 238           | <b>1,992</b>   | <b>4.9%</b>   |
| <b>Total</b>       | <b>183</b>                          | <b>96</b>          | <b>836</b>                 | <b>894</b>    | <b>40,519</b>  | <b>11.5%</b>  |
| <b>Other Arabs</b> |                                     |                    |                            |               |                |               |
| Male               | 259                                 | 185                | 740                        | 1,657         | <b>7,880</b>   | <b>90.8%</b>  |
| Female             | 43                                  | 31                 | 287                        | 249           | <b>795</b>     | <b>9.2%</b>   |
| <b>Total</b>       | <b>302</b>                          | <b>216</b>         | <b>1,027</b>               | <b>1,906</b>  | <b>8,675</b>   | <b>2.5%</b>   |
| <b>Bangladesh</b>  |                                     |                    |                            |               |                |               |
| Male               | 56                                  | 9                  | 227                        | 79            | <b>8,626</b>   | <b>20.1%</b>  |
| Female             | 0                                   | 0                  | 11,187                     | 6             | <b>34,184</b>  | <b>79.9%</b>  |
| <b>Total</b>       | <b>56</b>                           | <b>9</b>           | <b>11,414</b>              | <b>85</b>     | <b>42,810</b>  | <b>12.1%</b>  |
| <b>Filipino</b>    |                                     |                    |                            |               |                |               |
| Male               | 5                                   | 13                 | 168                        | 71            | <b>844</b>     | <b>4.8%</b>   |
| Female             | 2                                   | 10                 | 15,933                     | 301           | <b>16,649</b>  | <b>95.2%</b>  |
| <b>Total</b>       | <b>7</b>                            | <b>23</b>          | <b>16,101</b>              | <b>372</b>    | <b>17,493</b>  | <b>5.0%</b>   |
| <b>Indian</b>      |                                     |                    |                            |               |                |               |
| Male               | 10                                  | 39                 | 114                        | 32            | <b>14,796</b>  | <b>96.1%</b>  |
| Female             | 7                                   | 3                  | 60                         | 2             | <b>608</b>     | <b>3.9%</b>   |
| <b>Total</b>       | <b>17</b>                           | <b>42</b>          | <b>174</b>                 | <b>34</b>     | <b>15,404</b>  | <b>4.4%</b>   |
| <b>Sri Lankan</b>  |                                     |                    |                            |               |                |               |
| Male               | 1                                   | 10                 | 71                         | 29            | <b>4,221</b>   | <b>44.7%</b>  |
| Female             | 2                                   | 4                  | 1,818                      | 22            | <b>5,212</b>   | <b>55.3%</b>  |
| <b>Total</b>       | <b>3</b>                            | <b>14</b>          | <b>1,889</b>               | <b>51</b>     | <b>9,433</b>   | <b>2.7%</b>   |
| <b>Pakistani</b>   |                                     |                    |                            |               |                |               |
| Male               | 6                                   | 29                 | 59                         | 28            | <b>2,833</b>   | <b>93.9%</b>  |
| Female             | 0                                   | 2                  | 3                          | 0             | <b>183</b>     | <b>6.1%</b>   |
| <b>Total</b>       | <b>6</b>                            | <b>31</b>          | <b>62</b>                  | <b>28</b>     | <b>3,016</b>   | <b>0.9%</b>   |
| <b>Others</b>      |                                     |                    |                            |               |                |               |
| Male               | 92                                  | 389                | 352                        | 329           | <b>4,889</b>   | <b>18.7%</b>  |
| Female             | 42                                  | 135                | 15,265                     | 179           | <b>21,292</b>  | <b>81.3%</b>  |
| <b>Total</b>       | <b>134</b>                          | <b>524</b>         | <b>15,617</b>              | <b>508</b>    | <b>26,181</b>  | <b>7.4%</b>   |
| <b>Total</b>       |                                     |                    |                            |               |                |               |
| Male               | 2,495                               | 1,972              | 26,671                     | 8,959         | <b>270,530</b> | <b>76.8%</b>  |
| Female             | 110                                 | 210                | 44,749                     | 1,097         | <b>81,820</b>  | <b>23.2%</b>  |
| <b>Total</b>       | <b>2,605</b>                        | <b>2,182</b>       | <b>71,420</b>              | <b>10,056</b> | <b>352,350</b> | <b>100.0%</b> |
| <b>Percent</b>     | <b>0.7%</b>                         | <b>0.6%</b>        | <b>20.3%</b>               | <b>2.9%</b>   | <b>100.0%</b>  |               |

Source: Ministry of Labour, Jordan

## C Migrants worldwide: Emigration

Different estimates exist for the number of Jordanians abroad. The statistics of the Jordanian Ministry of Foreign Affairs and Expatriates confirm that the number of Jordanian expatriates reached one million in about 70 countries around the world; about 80.0% of them are in the Arab Gulf States and 11% in the United States of America and Canada (Almadina News 2020). The United Nations estimates the number of Jordanians abroad to be about 785,000.

Table A5.12 below shows the number of Jordanians abroad as per the United Nations estimates broken down by country of destination for 2019. As shown in the table, Jordanians in Arab countries represent about 80 percent of the total number of Jordanians abroad. There are Jordanians abroad in many Arab countries, but the vast majority of Jordanians in Arab countries are found in two countries. Jordanians in Saudi Arabia alone comprise about 38 percent of Jordanians in Arab countries. In addition, UAE is host to about 27 percent of Jordanians in the Arab region. Saudi Arabia and UAE are together host to about two thirds of Jordanians in the Arab region and more than 50% of total Jordanians worldwide.

Jordanians in non-Arab countries comprise about 20% of Jordanians abroad. The United States of America alone is host to about 50 percent of Jordanians in non-Arab countries or more than 10 percent of total Jordanians abroad. Other principal countries of destination in non-Arab regions include Canada, Indonesia, Germany, Australia, the United Kingdom, and Sweden.

In summary, you can say that more than 60 percent of Jordanians abroad are found in three countries; Saudi Arabia, UAE, and the USA. Migration to Saudi Arabia and UAE represents temporary labor migration, while migration to the USA represents settlement migration.

Table A5.12: Jordanians abroad by major recipient countries and gender, 2019  
United Nations Estimates

| Recipient country                   | Number of mi-grants (stock) | Distribution by destina-tion for Arab countries and non-Arab countries (%) | Overall distribu-tion (%) |
|-------------------------------------|-----------------------------|--|---------------------------|
| <b>Arab Countries</b>               |                             |  |                           |
| Saudi Arabia                        | 234,661                     | 37.9%  | 29.9%                     |
| United Arab Emirates                | 166,467                     | 26.9%  | 21.2%                     |
| State of Palestine                  | 55,322                      | 8.9%   | 7.1%                      |
| Kuwait                              | 53,365                      | 8.6%   | 6.8%                      |
| Qatar                               | 32,861                      | 5.3%   | 4.2%                      |
| Libya                               | 21,653                      | 3.5%   | 2.8%                      |
| Oman                                | 21,071                      | 3.4%   | 2.7%                      |
| Bahrain                             | 15,255                      | 2.5%   | 1.9%                      |
| Other Arab countries                | 18,495                      | 3.0%   | 2.4%                      |
| <b>Total for Arab countries</b>     | <b>619,150</b>              | <b>100.0%</b>  | <b>78.9%</b>              |
| <b>Non-Arab Countries</b>           |                             |  |                           |
| United States of America            | 81,375                      | 49.3%  | 10.4%                     |
| Canada                              | 14,102                      | 8.5%   | 1.8%                      |
| Indonesia                           | 12,507                      | 7.6%   | 1.6%                      |
| Germany                             | 11,709                      | 7.1%   | 1.5%                      |
| Australia                           | 7,871                       | 4.8%   | 1.0%                      |
| United Kingdom                      | 6,340                       | 3.8%   | 0.8%                      |
| Sweden                              | 5,187                       | 3.1%   | 0.7%                      |
| Other non-Arab countries            | 26,136                      | 15.8%  | 3.3%                      |
| <b>Total for non-Arab countries</b> | <b>165,227</b>              | <b>100.0%</b>  | <b>21.1%</b>              |
| <b>Total for all countries</b>      | <b>784,377</b>              | <b>--</b>  | <b>100.0%</b>             |

Source: United Nations (2019)

# III. Morocco

A

## History of Moroccan migration

Moroccan emigration to Europe, the Middle East and Africa is an old phenomenon. It has grown in the form of labour migration since the 1960s in the last century, mainly to Western Europe. The initial destination countries were France, Belgium, the Netherlands and Germany. A second major wave moved to Spain and Italy from the 1980s and 1990s, then more recently to other host countries. Moroccan migration has undergone significant changes in the past fifty years. The three main sets of changes are as follows.

1. A more complex phenomenon: multiplication and diversification of flows (long-term, seasonal, regular and irregular migrants, asylum seekers, refugees, adults and unaccompanied minor children, etc.).
2. Transformation of the migration model: from temporary and circular migration to permanent migration, migration of families with family reunification, multiplication of areas of emigration to Morocco and of the host countries and regions.
3. Change in the migrant's profile: feminisation, higher level of education and training, increasingly of urban origin

B

## International migration stock

Moving to Morocco on the western side of the Mediterranean, it can be seen that migration to Morocco is not new. It grew rapidly between 1910 and 1950 with the arrival of Europeans who accompanied colonisation. Their number was more than half a million, especially French and Spanish citizens. Then it fell sharply since the late 1950s after independence. Currently, the foreign population in Morocco is small, much smaller than the Moroccan population abroad. However, it has tended to increase significantly over the past fifteen years.

### Stocks of international migrants

According to United Nations estimates, shown in Table A5.13 below, the number of international migrants in Morocco reached 103,000 in 2019. Most of the international migrants in Morocco come from France, Algeria and Spain. Migrants from these three countries account for more than 55 percent of the international migrants in Morocco.

Historically a transit country, Morocco is now also becoming a country of destination. Refugees, of which 55 percent are from the Syria, reside in many locations across the country. Other refugees come mainly from Cameroon, Guinea, and Yemen.

Table A5.13: **International migrants in Morocco by nationality and gender, 2019**  
**United Nations estimates**

| Major source countries | Male          |              | Female        |              | Total         |
|------------------------|---------------|--------------|---------------|--------------|---------------|
|                        | Number        | Percent      | Number        | Percent      |               |
| France                 | 18,642        | 50.1%        | 18,531        | 49.9%        | 37,173        |
| Algeria                | 7,110         | 50.2%        | 7,054         | 49.8%        | 14,164        |
| Spain                  | 2,170         | 50.2%        | 2,150         | 49.8%        | 4,320         |
| Tunisia                | 1,365         | 50.2%        | 1,353         | 49.8%        | 2,718         |
| Syria                  | 1,085         | 50.3%        | 1,073         | 49.7%        | 2,158         |
| Italy                  | 1,004         | 50.3%        | 994           | 49.7%        | 1,998         |
| Congo                  | 996           | 50.3%        | 986           | 49.7%        | 1,982         |
| Egypt                  | 985           | 50.3%        | 974           | 49.7%        | 1,959         |
| USA                    | 968           | 50.3%        | 958           | 49.7%        | 1,926         |
| Senegal                | 957           | 50.3%        | 946           | 49.7%        | 1,903         |
| Iraq                   | 909           | 50.3%        | 897           | 49.7%        | 1,806         |
| Mauritania             | 842           | 50.2%        | 836           | 49.8%        | 1,678         |
| Germany                | 762           | 50.2%        | 756           | 49.8%        | 1,518         |
| Belgium                | 744           | 50.3%        | 734           | 49.7%        | 1,478         |
| Lebanon                | 715           | 50.3%        | 707           | 49.7%        | 1,422         |
| United Kingdom         | 643           | 50.3%        | 635           | 49.7%        | 1,278         |
| Libya                  | 623           | 50.3%        | 616           | 49.7%        | 1,239         |
| Guinea                 | 521           | 50.2%        | 516           | 49.8%        | 1,037         |
| Other countries        | 8,438         | 50.2%        | 8,379         | 49.8%        | 16,817        |
| <b>Total</b>           | <b>49,479</b> | <b>50.2%</b> | <b>49,095</b> | <b>49.8%</b> | <b>98,574</b> |

Source: United Nations (2019)

### National immigration and asylum policy

The turning point in migration governance in Morocco started in 2003 with Act 02/03 on the Entry and Stay of Foreign Nationals, Emigration and Irregular Migration, which came into force in November 2003.<sup>69</sup> Act 02/03 is considered to be a comprehensive reform of the Moroccan legal system regarding irregular migration including irregular entry, stay, exit, and other issues regarding the criminalisation and punishment of irregular migration and imposing strong penalties for supporting and organising irregular migration. In addition, Act 02/03 brought in protection from deportation for some immigrant categories. This Act, however, was resisted and denounced by Moroccan civil society and academia.

The new Moroccan Constitution of 2011 is another milestone in Moroccan migration governance. The policy introduced provisions regarding the non-discrimination of foreign migrants and the protection of their rights. Based on the guidelines of the national constitutions, Morocco issued its National Immigration and Asylum Policy in 2013. The law marks the real positive change in migration policymaking. The Moroccan migration policy is based on humanitarian considerations and promotes integration and access to the healthcare system, education, housing, employment, and other services. It considers migration to be an opportunity rather than a social, economic or political threat. It focuses on sharing the burden between countries of origin, destination and transit, as well as the responsibilities and duties of migrants themselves. It has bilateral, regional and international governance dimensions.

As part of the new Moroccan migration policy, a campaign for the exceptional regularisation of foreigners with irregular administrative status in Morocco took place in 2014. Under this campaign, 25,000 foreigners were regularised. Regularisation benefited nationals of 116 countries, with Senegalese forming the largest group (6,600), followed by Syrians (5,250), Nigerians (2,380), Ivorians (2,281), Cameroonians (1,410), Guineans (1,408), and Malians (1,119) (Mbarek, 2017). A second round of regularisation started in December 2016.

## Migrants worldwide: Emigration

Moroccan emigration is an old phenomenon. It has grown in the form of labour migration since the 1960s, mainly to Western Europe. The initial destination countries were France, Belgium, the Netherlands and Germany. A second major stream of migration targeted Spain and Italy in the 1980s and 1990s. National estimates of Moroccans abroad pushes the figure to five million. The United Nations estimates the number of Moroccans abroad to be 3.1 million, as shown in Table A5.14.

While France is the main European destination for Moroccans, Moroccans are not concentrated in France as Algerians are (80 percent of Algerians abroad) or as Tunisian are with more than 50 percent of Tunisians in France. Moroccans in France comprise only one third of Moroccans abroad. Other countries of destination for Moroccans in Europe include Spain (22.7 percent), Italy (14.4 percent), and then Belgium, Netherlands, and Germany. Moroccans in Europe comprise about 85 percent of Moroccans abroad.

69 Official Gazette No. 5160 of Thursday 13 November 2003.

Table A5.14: **Moroccans abroad by major recipient country and gender, 2019**  
**United Nations estimates**

| Major recipient country | Male             | Female           | Total            | Percent       |
|-------------------------|------------------|------------------|------------------|---------------|
| France                  | 520,783          | 499,379          | 1,020,162        | 32.5%         |
| Spain                   | 389,960          | 321,832          | 711,792          | 22.7%         |
| Italy                   | 248,622          | 201,935          | 450,557          | 14.4%         |
| Belgium                 | 116,724          | 109,492          | 226,216          | 7.2%          |
| Netherlands             | 93,563           | 87,316           | 180,879          | 5.8%          |
| Germany                 | 59,645           | 46,283           | 105,928          | 3.4%          |
| USA                     | 35,302           | 44,344           | 79,646           | 2.5%          |
| Canada                  | 38,321           | 35,592           | 73,913           | 2.4%          |
| United Kingdom          | 12,661           | 11,502           | 24,163           | 0.8%          |
| Switzerland             | 8,094            | 10,600           | 18,694           | 0.6%          |
| Sweden                  | 5,776            | 5,769            | 11,545           | 0.4%          |
| UAE                     | 6,068            | 2,743            | 8,811            | 0.3%          |
| Norway                  | 3,478            | 2,876            | 6,354            | 0.2%          |
| Denmark                 | 3,054            | 3,036            | 6,090            | 0.2%          |
| Tunisia                 | 3,037            | 2,842            | 5,879            | 0.2%          |
| Other Countries         | 101,818          | 103,622          | 205,440          | 6.6%          |
| <b>Total</b>            | <b>1,646,906</b> | <b>1,489,163</b> | <b>3,136,069</b> | <b>100.0%</b> |

Source: United Nations (2019)

## D Legal sources and implementing institutions

### Main implementing institutions:

- The Ministry of Labour and Professional Integration (MTIP) prepares or contributes to the preparation of legal and regulatory documents, particularly in the areas of work, employment and social protection.
- The Ministry Delegate to the Ministry of Foreign Affairs and Cooperation, in charge of Moroccans residing abroad and Migration Affairs, develops and implements the national strategy for Moroccans residing abroad and the national strategy for immigration and asylum.
- The National Agency for the Promotion of Employment and Skills (ANAPEC) is a public establishment created in 2000 and is under the supervision of the Ministry of Employment and Professional Integration.
  - ANAPEC's mission is to contribute to the organisation and implementation of employment promotion programmes decided on by the public authorities. To this end, it is responsible for mediation between companies and job seekers on the one hand, for Moroccans in Morocco and abroad, and for foreigners in Morocco on the other hand. ANAPEC is responsible for prospecting for and collecting job offers and getting in touch with applicants. It also provides reception, information and guidance for these applicants and support for young promoters. It also advises employers on the definition of their skills needs and proceeds to the setting up of vocational training integration programmes in working life in conjunction with training establishments.
- The Office of Vocational Training and Promotion of Work (OFPPT) is a public establishment and a national operator of vocational training created in 1974 and its objective is to train young people so that they are competent and able to integrate in the era of globalisation.
- Other public organisations provide measures in favour of Moroccan living abroad: the "Fondation Hassan II pour les MRE", the "Fondation Mohamed V pour la solidarité" and the "Conseil de la communauté marocaine à l'étranger" (CCME).

### Specific labour market programmes (sample)

#### IDMAJ programme

Programme allowing young graduates to acquire their first professional experience within a company to promote their integration into professional life and allowing companies to develop their human resources by recruiting young graduates (see the achievements above).

#### Taehil programme

Programme aimed at improving the employability of jobseekers by allowing them to acquire professional skills to fill duly identified or potential jobs, through three training systems: contracted training for employment (FCE), qualifying or retraining training (FQR), training to support emerging sectors (ESF).

From its launch in 2007 until the end of 2018, the Taehil programme benefited nearly 202,000 people, i.e. more than 16,800 beneficiaries on average per year and an average annual growth rate of 10%.

Training for the benefit of emerging sectors (ESF) benefited almost half (47.4%) of the beneficiaries of the said programmes in 2018, compared with 11.1% for contracted training for employment (ESF) and 9.2% for qualifying or retraining training (FQR). As for training measures carried out within the framework of the partnership or online, they benefited respectively 13.4% and 18.9% of the total beneficiaries in 2018.

**Self-employment programme**

Programme aimed at supporting the creation of very small businesses (TPEs). It is a strategic measure for integration into working life and job creation. The implementation of this programme involves several public and private stakeholders: chambers of commerce, industry and services, OFPPT, microcredit associations, private companies and training establishments.

In 2018, this programme recorded the creation of 1,351 companies. If this marks only a development of 4% compared to the previous year, it allowed on the other hand a 67% development in jobs directly created, that is 4,526 jobs, which is equivalent to a little more than 3 jobs generated on average per business created.

As for the number of project leaders supported or in the process of being supported, during the last five years this went from 1,202 candidates in 2013 to 2,785 in 2018, an increase of more than 18% on average annually, compared with a decline of 39% during the 2010–2013 period.

**Tahfiz programme**

The objective of this programme is to promote employment by setting up incentive measures for the benefit of companies created between 1 January 2015 and 31 December 2019 and of associations that hire job seekers under employment contracts for indefinite periods.

About 8,848 jobseekers (65% men and 35% women) and 3,738 companies benefited from this programme between 2016 and 2018. By diploma: 35% of higher education graduates, 19% of Baccalaureate holders and 22% of vocational training graduates.

By sector of activity, services 67%, industry (10%), construction (10%), education (6%) and hotels (5%).

# IV. Tunisia

A

## History of Tunisian migration

Tunisian emigration has traditionally leaned towards Western European countries - notably France, Germany, Italy and Belgium - thereby revealing a system of neighbourhood migration. Labour migration, underpinned by a technical cooperation scheme, has developed since the 1970s, albeit to a lesser extent, towards oil-producing countries such as Libya and the Gulf countries. The average growth in the number of Tunisian people residing abroad has been around 4.7% per year over the past decade, which is over triple the demographic growth of the total Tunisian population of 1.2% during the same period (Kriâa 2014).

Such an upsurge in the migration trend is arguably ascribable to the turmoil following the popular revolt of 2011, referred to as the Tunisian Revolution. Indeed, the annual number of migrants almost doubled over the period 2011-12 compared to their counterparts from 2005-2010. The total increased from 26,085 (the average value from 2005 to 2010) to 50,391 (2011-12) (Kriâa 2014). Another major consequence of the 2011 revolution was the escalation of what is referred to as "harragas", that is people who tried to cross the Mediterranean and reach, in particular, the Italian island of Lampedusa. Their number reached 20,500 at the end of the first quarter of 2011, dropping rapidly to 4,500 in the second quarter, 3,500 in the third and no more than 96 migrants at the end of the last quarter (Boubakri 2015).

Overall, the socioeconomic profile of Tunisian immigrants has been enhanced over the past decade. The flows of highly qualified leavers (those with a university degree or more) have evolved into a significant proportion of the total number of those leaving, rising from 14.1% in 2005 to 22.9% in 2009. As a result, it turned out that significant investment aimed at improving the Tunisian education system did not bear fruit in terms of highly skilled job opportunities, since the unemployment rate for highly qualified people increased from 8.6% in 1999 to 22.9% in 2010, while the unemployment rate remained stable at 13.3% (Flayols 2019).

B

## International migration stock

The geographical proximity between Tunisia and the Italian island of Lampedusa made the country a hot spot for transit migrants who target Europe. The Arab Spring had an immediate impact on international migration in the Middle East and North Africa as reflected in the return migration from Libya, border crossings from Syria to Turkey and other neighbouring countries, and the slight one-off rise in irregular migration from Tunisia immediately after the fall of Ben Ali's regime.

### Stocks of international migrants

According to United Nations estimates, shown in Table A5.15 below, the number of international migrants in Tunisia reached 57,000 in 2019. Most of the international migrants in Tunisia come from Algeria, Libya, France and Morocco. The migrants from these four countries account for 60 percent of all international migrants in Tunisia. It is likely that the United Nations figure underestimates the Libyan influx to Tunisia after the 2011 political unrest in Libya.

However, it is difficult to estimate the exact number of foreigners living in Tunisia given the unclarity surrounding foreigners residing in irregular situations, and in particular that of Libyans whose number remains very variable. Since 2011, the entry of Libyans into Tunisia is not subject to the visa system so that it is often the case that they reside in Tunisia without regularising their residence situation. The statistics on Libyan refugees in Tunisia are not very precise. Three different estimates are provided by different ministries in 2014: the Tunisian Minister of Commerce claimed that the country was host to more than one million Libyan refugees (Ministry of Commerce), 800,000 (Ministry of the Interior) and 1.5 million (Ministry of Foreign Affairs).

Table A5.15: **International Migrants in Tunisia by Nationality and Sex, 2019**  
United Nations Estimates

| Major source country | Male          |              | Female        |              | Total         |
|----------------------|---------------|--------------|---------------|--------------|---------------|
|                      | Number        | Percent      | Number        | Percent      |               |
| Algeria              | 5,468         | 51.7%        | 5,112         | 48.3%        | 10,580        |
| Libya                | 4,788         | 51.7%        | 4,479         | 48.3%        | 9,267         |
| France               | 4,523         | 51.7%        | 4,230         | 48.3%        | 8,753         |
| Morocco              | 3,037         | 51.7%        | 2,842         | 48.3%        | 5,879         |
| Italy                | 1,163         | 51.8%        | 1,081         | 48.2%        | 2,244         |
| Germany              | 760           | 51.7%        | 711           | 48.3%        | 1,471         |
| Syria                | 657           | 52.6%        | 591           | 47.4%        | 1,248         |
| Egypt                | 597           | 51.7%        | 557           | 48.3%        | 1,154         |
| Mali                 | 516           | 51.0%        | 496           | 49.0%        | 1,012         |
| Other countries      | 8,235         | 52.0%        | 7,612         | 48.0%        | 15,847        |
| <b>Total</b>         | <b>29,744</b> | <b>51.8%</b> | <b>27,711</b> | <b>48.2%</b> | <b>57,455</b> |

Source: United Nations (2019)

### International migrants in the labour market

The Ministry of Vocational Training and Employment (MFPE) has the authority to grant, renew or refuse to issue work permits. These are often directly supervised, followed up and controlled by the MFPE and the Ministry of Interior. The number of work permits granted by the MFPE to foreign workers (whose contracts have been approved, either for the first time or for renewal) in Tunisia is very low, with barely 6,174 foreigners in regular employment in 2015, compared with 7,651 in 2010.

However, a significant number of African migrants work in the informal sector. Indeed, Tunisia has recently become a transit country for irregular migration, mainly from African countries. An unknown number of these migrants opted to settle in Tunisia by surviving with low-skilled jobs, lacking adequate social protection and decent wages. This migration has further fuelled an increasingly developed informal job market in Tunisia.

### Distribution of workers and employees by profession

Contrary to the stereotype, international migrants, especially those from the rest of African continent, tend to be employed in highly qualified occupations (Labidi et al. 2017). The setting up of the African Development Bank in the capital, Tunis, during the period 2003–2014, as well as several private universities, has played an important role in attracting highly qualified Africans (international experts, managers and the like) and students to Tunisia. In addition, foreign companies based in Tunisia attract highly skilled workers. In 2015, 1,542 out of 6,174 work permits (25 percent) are granted by the MFPE to foreign workers as high level managers of companies. The number of work permits granted to workers in the tourism sector does not exceed 583 (9.5 percent). The distribution of work permits by sector (Table A5.16) shows that 30 percent (1,852 out of 6,174 in 2015) of workers are employed in the manufacturing industries (Labidi et al. 2017). On the other hand, immigrants in an irregular situation (from other countries in Africa), survive in clandestine, low-skilled and low-pay economic activities (Flayols 2019). Women in an irregular situation work mainly in domestic services.

Table A5.16: **Distribution of immigrant workers by subsectors of activity (2013–2015)**

| Sector                            | 2013         | 2014         | 2015         |
|-----------------------------------|--------------|--------------|--------------|
| Manufacturing industries          | 1,763        | 2,141        | 1,852        |
| Non-manufacturing industries      | 311          | 390          | 349          |
| Building                          | 423          | 588          | 611          |
| Hotels and restaurants            | 587          | 496          | 506          |
| Transport and communications      | 1,033        | 767          | 827          |
| Real estate and business services | 928          | 1,256        | 1,013        |
| Others                            | 827          | 973          | 1,016        |
| <b>Total</b>                      | <b>5,872</b> | <b>6,611</b> | <b>6,174</b> |

Source: Labidi et al. (2017).

## C Migrants worldwide: Emigration

Table A5.17 below shows the number of Tunisians abroad as per the United Nations estimates broken down by country of destination for 2019. As shown in the table, Tunisians in France alone represent more than 50 percent of the total number of Tunisians abroad. Other main countries of destination for Tunisians abroad include the USA and Italy. The USA is host to 16.1 percent of Tunisians abroad while Italy is host to 13.5 percent. Tunisian migrants in these three countries represent 82.2 percent of Tunisians abroad. As for other non-Arab countries, Germany, Belgium and Switzerland are host to about 10 percent of Tunisians abroad. As for the destinations of Tunisians in Arab countries, the list of major recipient countries include UAE, Libya, Morocco and Kuwait. The Tunisian pattern of emigration is almost the same as in Morocco but to a lesser degree.

Table A5.17: **Tunisians abroad by major recipient country and gender, 2019**  
**United Nations estimates**

| Major recipient country | Male           | Female         | Total          | Percent       |
|-------------------------|----------------|----------------|----------------|---------------|
| France                  | 232,859        | 195,038        | 427,897        | 52.6%         |
| USA                     | 63,470         | 67,071         | 130,541        | 16.1%         |
| Italy                   | 68,685         | 40,702         | 109,387        | 13.5%         |
| Germany                 | 26,036         | 12,184         | 38,220         | 4.7%          |
| Belgium                 | 9,967          | 5,715          | 15,682         | 1.9%          |
| Switzerland             | 7,944          | 4,513          | 12,457         | 1.5%          |
| United Kingdom          | 4,396          | 2,106          | 6,502          | 0.8%          |
| Sweden                  | 3,669          | 2,212          | 5,881          | 0.7%          |
| UAE                     | 3,987          | 1,801          | 5,788          | 0.7%          |
| Netherlands             | 3,199          | 1,802          | 5,001          | 0.6%          |
| Austria                 | 3,057          | 1,299          | 4,356          | 0.5%          |
| Libya                   | 2,041          | 1,231          | 3,272          | 0.4%          |
| Spain                   | 1,888          | 944            | 2,832          | 0.3%          |
| Morocco                 | 1,365          | 1,353          | 2,718          | 0.3%          |
| Kuwait                  | 1,141          | 748            | 1,889          | 0.2%          |
| Romania                 | 1,227          | 557            | 1,784          | 0.2%          |
| Other countries         | 21,435         | 17,571         | 39,006         | 4.8%          |
| <b>Total</b>            | <b>456,366</b> | <b>356,847</b> | <b>813,213</b> | <b>100.0%</b> |

Source: United Nations (2019)

## D Legal sources and main implementing institutions

### a) Main implementing institutions

- SEITE: was in charge of coordinating the various facets of the migration issue by contributing to the development and execution of the state policy relating to the migration of Tunisians, fostering the integration and prosperity of Tunisians working abroad, coordinating the endeavours of the parties involved in migration, taking part in the bilateral and multilateral negotiations dealing with migration, conducting research on migration topics, and consolidating the bonds of Tunisians working abroad with their home land.<sup>70</sup>
- ONM: is responsible for updating, analysing and cataloguing data on migration, especially via field work.
- The High Consultative Council of Tunisians Abroad is an interface meant to monitor migration policies, boost endeavours geared towards the wealth of Tunisians living abroad, and enhance the image of Tunisia worldwide.
- The Ministry of the Interior: strives to improve migration governance, in addition to granting residence permits to nationals from foreign countries.
- The Ministry of Justice: attends to the legal consistency of mobility agreements with other countries.
- The technical ministries: deal with the international cooperation aspect of the migration process, focusing on the qualitative aspects of skills mobility.
- MAS: intervenes in the migration topic on several levels and with several structures.
- OTE: fosters commitment, respect and professionalism of Tunisians residing abroad, seeks to develop and implement programmes targeted at migrants and their families, collects and relays to ONM data about migrants and their families, deals with the grievances of Tunisian citizens residing abroad, monitors projects created by Tunisian expatriates, disseminates amongst Tunisian expatriates information about social security bilateral conventions, customs, and economic agreements, and organises leisure and educational activities for young Tunisians residing abroad.
- MAE: leads bilateral and multilateral negotiations and ratifies international agreements for Tunisia, particularly in the area of migration, while implementing the foreign policy of the government in accordance with the guidelines and options set up by the Head of State.<sup>71</sup>
- MFPE: manages international migration via the International Employment Division of ANETI as well as the General Directorate of Emigration and Foreign Labour, such as providing technical assistance to MAE in the negotiation of bilateral migration agreements; granting permits to private international placement agencies,<sup>72</sup> creates the legal framework for foreign workers in conjunction with MAS (in terms of application of the Labour Code with the Ministry of Development and International Cooperation (regarding the quotas of foreign workers and incentives for foreign investment).
- ANETI: under the supervision of the Ministry of Vocational Training and Employment, is tasked with placing the Tunisian workforce abroad and ensuring the successful completion of the placement operation whilst looking after their social issues, especially in terms of family reunification, provides the necessary information to applicants for emigration through the “international referrer” that is part of its staff,<sup>73</sup> reintegrates migrant workers into the national economy after their return to Tunisia, and establishes links between providers and jobseekers at national and international levels.
- ATCT: under the supervision of the Ministry of Economy and Finance and sometimes in tandem with ANETI, specialises in the looking for employment opportunities as well the placement of qualified Tunisians and young graduates without professional experience abroad, which involves training

<sup>70</sup> Although officially dissolved, the structure of SEMTE is still functioning.

<sup>71</sup> To that end, the General Directorate of Consular Affairs within the MAE has developed the GELIA system, a database on Tunisians abroad made up of input from Tunisian consulates abroad.

<sup>72</sup> There are twelve such agencies, but not all of them are active.

<sup>73</sup> Several cooperation programmes exist between ANETI and certain host countries (i.e. Canada, France, Germany, etc.) in order to build capacity, help them to adjust, and provide additional training to young candidates for emigration.

and development of foreign executives in Tunisia, provides additional specialised training for the registered candidates, and maintains a platform gathering all the information relating to the positions offered on an international scale.

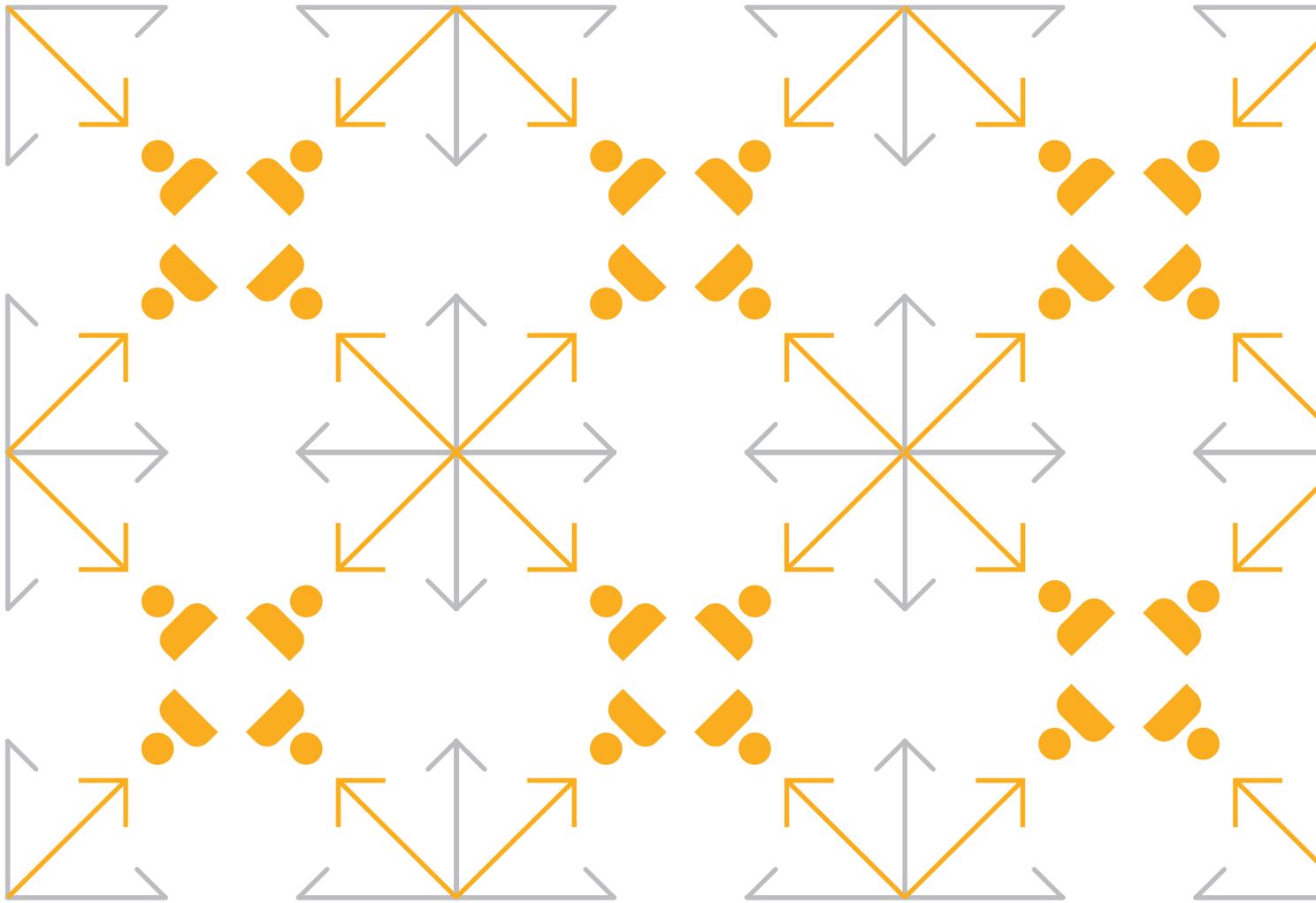
- One-stop shops, such as the OTEs and the APIIs, are information centres holding in a single location the various administrative procedures and formalities required to set up businesses and approve goods.

#### **b) Specific labour market programmes and examples of international cooperation on labour migration**

- The EMP, also known as the “Barcelona Process”<sup>74</sup>, was launched in 1995 as a comprehensive multilateral forum for dialogue and cooperation at regional level between the EU, its Member States and several Mediterranean third-party countries. The EMP includes three areas of dialogue and cooperation: political and security issues; economic and financial issues; and social and cultural issues. Although migration cuts across all three areas, it was placed under the third. Cooperation in migration under the EMP has not produced any relevant outcomes. The main focus of the EMP is on strengthening economic cooperation in the Mediterranean (second pillar), along with the issue of security (first pillar), whereas the third pillar has been largely neglected.
- The EU-Tunisia Association Agreement establishes conditions for bilateral cooperation between the EU and Tunisia in a variety of fields. Similar to the EMP, the main focus of the agreement is economic cooperation and trade, whereas political dialogue and sociocultural cooperation (which includes migration cooperation) are dealt with only marginally.
- The 5+5 Dialogue is a multilateral subregional cooperation initiative established in 2002 in order to focus on migration in the Western Mediterranean. It involves five European countries (France, Italy, Malta, Portugal, and Spain) and five Mediterranean third countries (Algeria, Libya, Mauritania, Morocco, and Tunisia), with the participation of the IOM, ILO and ICMPD as observers. The 5+5 Dialogue is mainly concerned with security issues: the fight against irregular migration and human trafficking, joint border management, and information exchange.
- The ENP is a bilateral cooperation initiative launched by the European Commission in 2004. It is implemented through bilateral action plans, laying out guidelines for cooperation with each third country in different policy areas.
- Tunisia signed on 3 March 2014 the Mobility Partnership with ten EU members (Belgium, Denmark, Germany, Spain, France, Italy, Poland, Portugal, Sweden and the United Kingdom). This EU-Tunisia partnership aims “to facilitate the movement of people between the EU and Tunisia and to promote common and responsible management of existing migratory flows, including by simplifying procedures for granting visas”.<sup>75</sup> Through this partnership, the EU and Tunisia intend to develop their bilateral relations in the fields of migration, mobility and security. In addition, they will cooperate together to better meet the challenges faced in the Mediterranean.
- The Lemma Project is the flagship project launched in support of the implementation of the Mobility Partnership between the EU and Tunisia. It aims to strengthen the Tunisian Government’s capacity for developing and enacting its national migration policy. The EU devoted a budget of EUR 5 million to Lemma through the Development Cooperation Instrument (DCI). Six Member States contribute to the project: Belgium, France, Italy, Poland, Portugal, and Sweden, which supply expertise (through development agencies, public bodies, ministries, technical operators).
- “ProGreS Migration Tunisie” aims to strengthen migration governance and develop socio-economic opportunities for potential migrants, in accordance with four areas for action: implementing Tunisia’s National Migration Strategy, developing job and investment opportunities through diaspora mobilisation, creating a service to welcome Tunisian migrants and offer them socioeconomic reintegration, and managing migration locally.
- The Readmission Agreement and Visa Facilitation Agreement were meant to establish procedures for the readmission of irregular migrants and to facilitate the process of issuing short-stay visas respectively. The EU offers privileges for short-term stays of highly skilled Tunisian labourers to support its economic needs in specific sectors. Since 2017, there has also been a renewed focus on irregular emigration from Tunisia. The issue of the circulation of goods is also becoming prominent as a precondition to the (possible) improvement in the circulation of persons between Tunisia and the EU.

<sup>74</sup> The Barcelona Process applies to all four countries analysed in this report.

<sup>75</sup> [https://ec.europa.eu/commission/presscorner/detail/en/IP\\_14\\_208](https://ec.europa.eu/commission/presscorner/detail/en/IP_14_208).



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