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Migration Outlook

2020

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1. Introduction

The intention of ICMPD's Migration Outlook is to present a short analysis of recent migration and migration policy related trends and to provide a first outlook on possible developments and events to watch out for in 2020. Experience shows that migration prognosis is hard to make. The outlook does not claim to be able to foretell the future or to cover all what might be possibly relevant developments. It wants to use past experience to highlight what is likely to happen and important to consider. This paper is based on the most recent data that was available at the time of writing. Statistical information refers to data updated between October 2019 and December 2019.

Size and direction of international migration flows depend on the impact of some **main drivers** or **megatrends**. These main drivers are war, civil war and conflict; the globalisation of economies, values and aspirations; changing technologies and means of communication; shifting demographics; increasing longevity; increasing educational levels; urbanisation and – to an increasing extent – environmental factors and climate change. Together they form the global and long-term migration climate in which regional and short-term developments are embedded in.

Over time, the impact of these drivers intensifies rather than weakens. The share of international migrants among the world's population is still quite small. Due to the world's population growth, however, the absolute number of international migrants increases more significantly. Today, violent conflicts are overwhelmingly internal and cause ever growing numbers of internally displaced. This trend is aggravated by the increasing effects of climate change and environmental degradation. The majority of internal migration flows continue to move to and within the global north but migration in the global south gains in importance. The latter is driven by accelerating socio-economic development in low and middle income countries, higher educational levels, longevity, and higher degrees of urbanisation. Demographic ageing affects high, middle and low income societies and increases the demand for emigration and immigration alike. Income disparities between the world regions persist and even widen, implying that migrating between them becomes rather more than less attractive. Last but not least, the revolutions in technology, communication and transport imply that core areas of humanity like work, learning, interaction or communication are no longer bound to their spatial roots.

Thus, the actual impact of these drivers depends on the **global opportunity structures**, in which migration decisions are taken and individual migrations projects are put into practice. Such opportunity structures comprise geographical proximity or distance; the density and capacity of migration control; entry and residence regulations; the existence and capacities of migrant smuggling networks; the characteristics of asylum and protection systems; job opportunities on formal and informal labour markets; the existence of family and social networks in countries of destination and en route and most importantly the willingness of states linked by migratory routes to cooperate on protection and the control of legal and irregular migration.

Available statistics confirm the increasing impact of the drivers outlined above. The latest estimates speak about **272 million international migrants**, representing 3.5 % of the world's population and an increase of 5.4 % in comparison to the 258 million international migrants from 2017. The total number of international migrants has grown faster than the world's population.¹

Mainly responsible for this disproportionate growth is the first driver mentioned, namely **war, civil war and conflict**. Between 1993 and 2018 the number of **globally displaced** more than doubled from **21.4 million** to **70.8 million**. The number of **refugees**, i.e. displaced persons residing outside their home country, increased between 1993 and 2018 by 14.1% from a total of **17.8 million** to a total of **20.4 million**.² During the same period the number of **Internally Displaced Persons (IDPs)** increased by almost ten times from a total of **4.2 million** to a total of **41.3 million**.³ Since the late 1980s, the number of interstate armed conflicts has constantly decreased. Thus, out of the 49 armed conflicts in 2017, only one was a conflict between states, the remaining 48 were internal.⁴ These conflicts also led to the largest numbers of displacement. In 2018, 57% of all refugees worldwide came from Syria, Afghanistan and South Sudan, also putting into perspective the notion of refugees being mainly economically motivated. With 3.7 million, Turkey hosts the largest number of refugees in the world, followed by Pakistan (1.4 million), Uganda (1.2 million), Sudan (1.1 million) and Germany (1.1 million).

Will this situation improve in the near future? The Global Peace Index 2019, using the three domains of ongoing domestic and international conflict, societal safety and security and militarisation as means for the measurement of peacefulness, observed a slight improvement of the global situation, however also concluded that the "state of peace" is either "low" or "very low" in a total of 42 countries.⁵ Also for 2020, a migration outlook will have to assume that flight and displacement will continue to constitute a large or even increasing share among international migration flows.

¹ UNDESA, International Migrant Stock 2019.

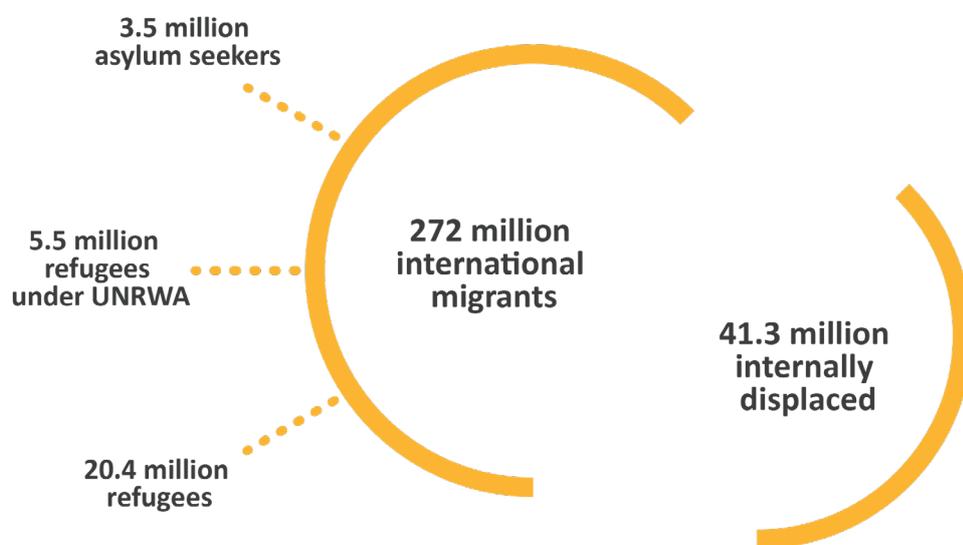
² 25.9 million refugees when also counting the 5.5 million Palestine refugees under UNRWA's mandate.

³ UN High Commissioner for Refugees (UNHCR), Global Trends: Forced Displacement in 2018, 20 June 2019, available at: <http://www.unhcr.org/statistics>, p. 2.

⁴ Peace Research Institute Oslo (PRIO), Trends in Armed Conflict, 1946 – 2017, PRIO Conflict Trends, May 2018.

⁵ Global Peace Index 2019: Measuring Peace in a Complex World, Sydney, June 2019.

Global migration and displacement situation



Source: UNHCR

2. Country and regional developments

Also in 2020, the migration situation in the wider European region will be shaped by developments in the conflict areas of the Near and Middle East and in North Africa. This does not imply that other regions in Africa and Asia deserve less attention or cooperation efforts, but any major and spontaneous refugee or irregular movements in 2020 would be linked to the situation in these countries. The major displacement crisis in Latin America will as well affect Europe in 2020. Due to geographical distance and the lack of direct land and sea routes related inflows might be significant but will not move in the quantitative dimensions of flows originating in the nearer neighbourhood.

2.1 Syria

Entering its ninth year of conflict in 2020, Syria remains the largest refugee and displacement crisis in the world. There are more than **12 million Syrians displaced**, 6.7 million Syrian refugees – 3.7 million of them in Turkey and 5.6 million in neighbouring countries, 6.2 million IDPs in Syria and 11.7 million in need of protection in Syria.⁶ 889,400 Syrians were newly displaced last year, 632,700 of them outside the country.⁷ Over the last two years the Syrian government continued to consolidate control, however, violence did not stop and Syria is likely to experience continued violence and new displacement also in 2020. In October, the conflict parties started talks on a new constitution for Syria but it is widely believed that also this attempt to end the conflict through

⁶ USAID, Syria – Complex Emergency, Fact Sheet # 1, Fiscal Year (FY) 2020, November 9, 2019, p. 1.

⁷ UN High Commissioner for Refugees (UNHCR), Global Trends: Forced Displacement in 2018, 20 June 2019, available at: <http://www.unhcr.org/statistics>, p. 6.

negotiation will not lead to a breakthrough in the near future. Also in October, American forces withdrew from northern Syria and the Turkish and Russian governments announced an agreement to clear Kurdish forces 30 kilometres from the Syrian-Turkish border. This should allow for establishing a safe zone where Syrian refugees can be resettled from Turkey. The aim is to build refugee cities in these safe zones and to facilitate the return of a considerable share of the Syrians who are under temporary protection in Turkey.⁸ This plan might trigger secondary movements to the EU, albeit on a rather limited scale.

2.2 Afghanistan

With a total **2.7 million Afghan refugees** are the second largest refugee population in the world. Over 88 % of Afghan refugees were hosted by neighbouring Pakistan and the Islamic Republic of Iran. Other major host countries are Turkey, Germany, Austria, Sweden, France, Italy and Switzerland. In Afghanistan both the security and economic situation have worsened in recent years and 2019 was no exception in this regard. The Taliban continued to make territorial gains and to attack the Afghan security forces.⁹ The peace process was halted and the Presidential elections from 28 September saw a spike in election-related violence before and after. Civilian casualties reached the highest number in years with more than 3,800 deaths and more than 7,100 wounded.¹⁰ Increased violence led to an increase in the total number of **IDPs to 2.1 million**, to economic decline across all sectors and even higher unemployment. In 2020, these developments will increase the potential of growing levels of flight and irregular migration from Afghanistan itself and secondary movements from Pakistan and Iran towards Turkey and the EU.

2.3 Iraq

The protests in October 2019 have put the government under pressure to make lasting changes in combatting corruption, mishandling of public funds, providing basic services to the population and creating job opportunities for young Iraqis. Analysts expect the protests to decline in 2020 due to government concessions and social welfare expansion and as a consequence a state of fragile stability.¹¹ Notwithstanding this, UNHCR reports a total of more than **1.8 million IDPs** in Iraq and another **944,000 IDPs who have returned** to their place of origin in 2018. Together with Kurdish movements to Iraq following the Turkish operation in North-eastern Syria and the bleak economic prospects especially for the young population, they form a considerable potential for onward migration towards Turkey and the EU also in 2020. Last year there were 39,100 refugees from Iraq recorded in Turkey¹² and with a total of 27,875 applications Iraq was the fourth-

⁸ Tamer Kilic (ICMPD), Migration Situation in Turkey and Developments related to Syria, Presentation, October 2019.

⁹ Center for Preventive Action, Global Conflict Tracker, War in Afghanistan, <https://www.cfr.org/interactive/global-conflict-tracker/conflict/war-afghanistan>.

¹⁰ Sedef Dearing (ICMPD), Silk Routes region. Overview of migration trends and the work of ICMPD, Presentation, Stockholm, October 2019.

¹¹ Oxford Analytica, Prospects for Iraq in 2020, <https://dailybrief.oxan.com/Analysis/DB247473/Prospects-for-Iraq-in-2020>.

¹² UN High Commissioner for Refugees (UNHCR), Global Trends: Forced Displacement in 2018, 20 June 2019, available at: <http://www.unhcr.org/statistics>, p. 18.

strongest country of origin of asylum seekers in the EU. The US strike which killed Qassem Soleimani and an eventual American withdrawal are expected to have serious implications for the security situation. This might result in further displacement and onward migration to Turkey and Europe.

2.4 Iran

Approximately **2.5 million Afghans** who have fled conflict and the bleak economy in their home country live in the Islamic Republic of Iran, which makes the country host to one of the largest and most protracted refugee populations worldwide.¹³ The sanctions against Iran have worsened the economic situation of this vulnerable group even more and led to secondary movements of Afghans from Iran to Turkey and the EU. Even if political tensions ease, the economic situation will prompt attempts of Afghan nationals to leave Iran for Turkey and the EU. This situation is likely to result in considerable **secondary movements of Afghan nationals** and might constitute one of the main challenges for European migration policy in 2020.

2.5 Libya

The migration situation in Libya is particularly complex. In the aftermath of the fall of the Gaddafi regime the country has hosted a mixed migration population including forced migrants, labour migrants, IDPs, migrants in transit towards Europe, and migrants whose destination is Libya itself. According to IOM figures there are **666,717 migrants** in Libya.¹⁴ For many of them there are hardly any economic or income opportunities in the country. The UNHCR counts **43,113 registered refugees** and **asylum-seekers, 217,002 IDPs** and **267,559 people who have returned** to their homes in Libya. An estimated **1.3 million people** are believed to be in need of humanitarian assistance.

As a result of unrest and civil war following the revolution, the Libyan authorities have only a limited capacity to manage migration and refugee issues, which leads to serious deficits in migrant protection and security. Human smuggling and trafficking networks prosper in the institutional and legal vacuum. Legal and administrative frameworks for regulating the residence of migrant workers in the country are missing. The resulting insecurity and exploitation causes many migrant workers to look for a way out. This results in secondary movements to Europe. Serious human rights concern remain. Nonetheless, the 2017 Memoranda of Understanding concluded between Libya and Italy, the 2017 Malta Declaration on EU cooperation with Libya and the cooperation with the Libyan Coast Guard remain fundamental building blocks of all EU attempts to control irregular migration to its territory.

The offensive on Tripoli by the Libyan National Army (LNA) in April triggered the largest mobilisation of fighters since 2011. A military stalemate followed and peace talks started in 2020.

¹³ UNHCR, Islamic Republic of Iran, <https://www.unhcr.org/islamic-republic-of-iran.html>

¹⁴ IOM, Displacement Tracking Matrix, Libya's Migrant Report, Round 24, January – February 2019, p. 3.

Both sides to the conflict have agreed to participate in a UN ceasefire committee but are not yet willing to negotiate directly with one another. 2020 will see the early steps towards conflict resolution but all sides know that a successful outcome of the peace process is anything but certain. Should the conflict escalate it will result in even sharper rifts in the country, which would also jeopardize the cooperation with the EU on migration along the Central Mediterranean Route.

2.6 African countries

UNHCR reports **23 active refugee situations** for Africa and a total of **6.3 million African refugees** and **17.7 million IDPs**.¹⁵ These situations are not only large in numbers, they also include refugee flows both from and to a country with large-scale internal displacement. Also in 2019, South Sudan remained the largest refugee situation. An estimated 2.2 million South Sudanese refugees have been displaced to Sudan, Uganda, Ethiopia, Kenya and the Democratic Republic of Congo, 1.8 million are considered internally displaced. There are 870,000 Somali refugees in the Horn of Africa and Yemen and 2.1 million IDPs in the country. With 905,000 persons, Ethiopia hosts the second largest refugee population in Africa. The Democratic Republic of Congo hosts 539,000 refugees but also records 4.5 million internally displaced. Sudan hosts 1.1 million refugees and 1.9 million IDPs, Nigeria records 1.9 million IDPs.

For 2020, geopolitical outlooks expect continued or growing instability for a number of African countries like DRC, Somalia, Burkina Faso, Mali, Niger, South Sudan, the Central African Republic and Burundi.¹⁶ Against this background and despite the fact that the share of African nationals among asylum seekers in Europe is below nationals from other regions like the Middle East, Asia and Europe itself, it can be expected that related trends will not decrease in 2020. The EU has started good cooperation and partnerships with many African countries that will continue to show positive effects also in 2020. A lot will depend on the situation in Libya as the main point of departure for African asylum seekers and irregular migrants headed towards Europe. The recently started peace process gives some hope to believe that the EU – Libya cooperation on migration control will hold also in 2020.

2.5 Latin America

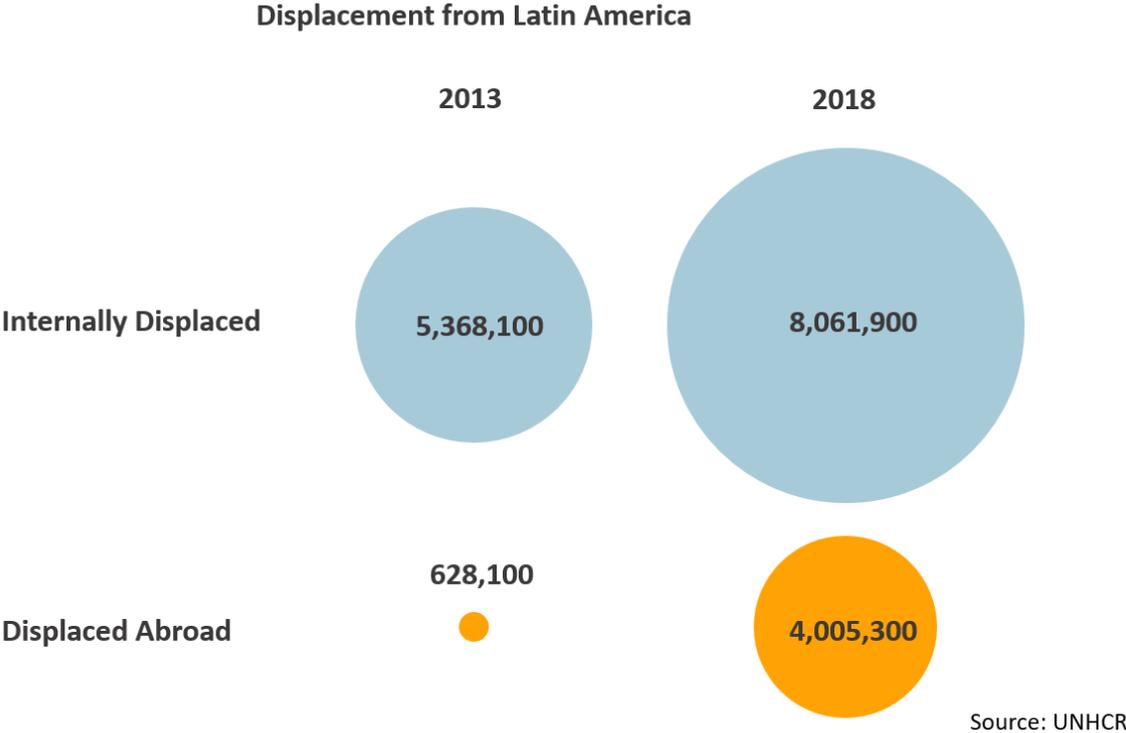
The European refugee crisis, which started in 2015 as a consequence the unrest in the aftermath of the Arab Spring of 2011, the civil war in Syria and the long-standing crises in Afghanistan and Iraq still draws most of the attention of the debate in Europe and the European neighbourhood. It is sometimes forgotten, however, that this crisis is a regional expression of a global crisis of displacement and forced migration that affects other world regions too.

Largely unnoticed by the European debate a displacement crisis evolved in Latin America that matches the crisis in the Eurasian and African regions in size and urgency. By the end of 2018, the

¹⁵ UNHCR Operational Portal, Refugee Situations, <https://data2.unhcr.org/en/situations>

¹⁶ Council on Foreign Relations, Center for Preventive Action, Preventive Priorities Survey 2020

UNHCR had counted more than **12 million persons of concern**¹⁷ in and from Latin American countries. This number implied a doubling of the total population of concern in comparison to 2013. The figure for 2018 included more than **8 million persons** who were considered **internally displaced** and app. **2.6 million Venezuelans** who had been **displaced abroad**.¹⁸ With a total of 8 million, the Colombian population of internally displaced was the second largest of IDPs in the world in 2018.



Meanwhile, the number of forcibly displaced Venezuelans is estimated at 4.6 million, most of them staying countries in the region, namely Colombia, Peru and Chile¹⁹, which in view of their own difficult situations take an increasingly restrictive stance towards Venezuelans fleeing to their territories.²⁰

Forced displacement in Latin America is **not mainly caused by targeted state persecution** but by other drivers of cross-border displacement, such as organised crime, generalised violence, food insecurity, state fragility and collapse of livelihoods. It largely falls under Bett’s definition of **survival migration** where people are forced to leave their home country because of an **existential**

¹⁷ Refugees, asylum seekers, returned refugees, IDPs, returned IDPs, persons under UNHCR’s statelessness mandate and others.

¹⁸ UN High Commissioner for Refugees (UNHCR), Global Trends: Forced Displacement in 2018, 20 June 2019, available at: <http://www.unhcr.org/statistics>, p. 74.

¹⁹ The Refugees Operational Portal, <https://data2.unhcr.org/en/situations/platform>.

²⁰ Jimmy Graham and Patrick Saez, Beneficial Policies Towards the Venezuela Crisis Depend on Development Finance November 26, 2019, <https://www.cgdev.org/blog/beneficial-policies-towards-venezuela-crisis-depend-development-finance>.

threat that cannot be remedied by their own government or any other arrangement at home.²¹ The situation in Venezuela is the most extreme example for such existential threat caused by a political and economic crisis. Figures like a 44 % unemployment rate, a recent inflation rate of 373,000 %, a 65 % decline in oil production in 2018/2019, which still accounts for 98 % of all exports and double digit decreases in GDP in 2016 and 2017 make obvious why nine out of ten Venezuelans are considered to live in poverty and why so many of them see no other option than to leave their home country.

The vast majority of forced migrants stay in countries in their own region. This also refers to the situation in Latin America. A small share of the displaced try to reach destinations further abroad. Traditionally, the U.S. were the main destination for displaced persons from Latin American countries outside their region. However, the strict immigration policies introduced by the Trump administration made it increasingly difficult for forced migrants from Latin America to reach the U.S. as a safe haven. A small share of forced migrants from Latin American countries, supposedly those with sufficient financial means, social contacts and human capital, has sought other alternatives. This conclusion can be drawn from the recent increases in asylum applications from citizens of Latin American countries in Europe (see chapter 3).

Analysts do not expect that the tensions existing throughout the region will soften in 2020. On the contrary, economic inequality, exclusion of poor and middle classes from access to opportunities, low investment in educational and welfare systems and wide-spread anti-establishment sentiment are expected to make the situation even more volatile.²² However, this assessment refers to the more stable systems in the regions, for countries like Venezuela and Colombia the situation looks a lot grimmer and political and economic recovery is expected to take a decade or more even in a best case scenario. In view of these prospects, it can be assumed that the total numbers of displaced in Latin America will rather increase than decrease in 2020. Against this background it can also be expected that migration along the recently developed pattern of forcibly displaced Latin Americans travelling to Europe will continue and intensify in 2020, at least as long as Spain as the main destination in Europe does not introduce fundamental changes in its admission policy towards citizens from Latin American countries.

²¹ Betts, Alexander. *Survival Migration: Failed Governance and the Crisis of Displacement*. Cornell University Press, 2013. JSTOR, www.jstor.org/stable/10.7591/j.ctt32b5cd, p. 23.

²² Bosworth, James, 2019 has been a difficult year in Latin America – 2020 may only get worse, Business Insider, <https://www.businessinsider.de/political-instability-protests-in-latin-america-may-intensify-in-2020-2019-11?op=1>.

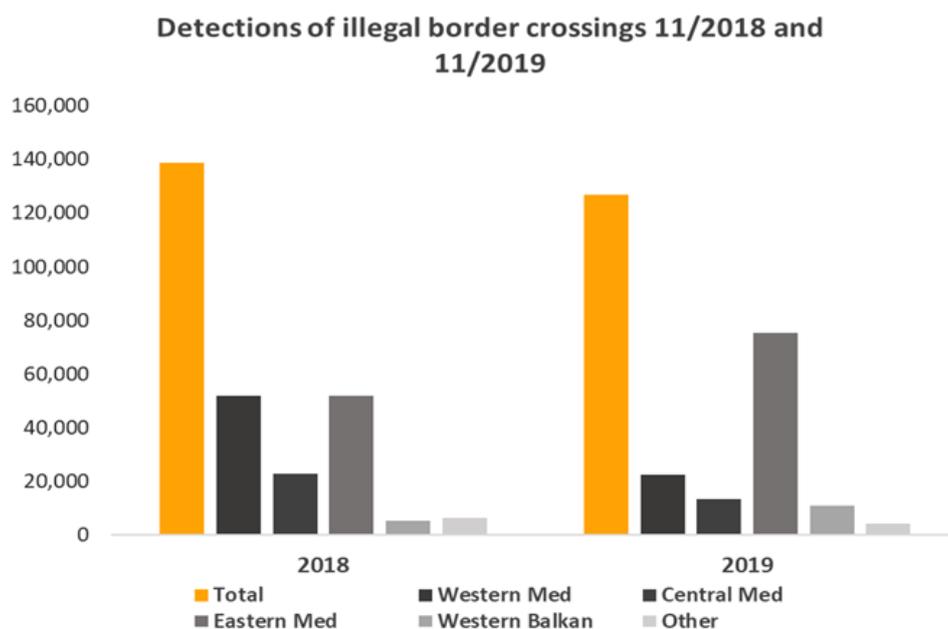
3. Irregular migration and asylum applications in Europe

Also in 2019, the migration debate in Europe was dominated primarily by issues surrounding irregular migration and asylum migration. Two sets of indicators inform about related developments, the **detections of illegal border-crossings** provided by **Frontex** and the total numbers of **asylum applications** submitted in the EU provided by **Eurostat**.

3.1 Detections of illegal border-crossings

In 2019 Frontex registered more than **139,000 illegal crossings** at the external borders of the EU. This implied a **decrease of 6% in comparison to 2018** and a decrease of 92% in comparison to the peak of 1.82 million illegal border crossings in 2015. The overall trend, however, did not reduce the pressure on all routes. In 2019, the detections shifted further away from the Central and Western Routes towards the **Eastern Mediterranean Route**. Here, the **number of detections increased by 46.0%** in comparison to 2018. Turkey. Notably, the trends in detections did not refer to all nationalities in similar ways. A break-down by nationality reveals that the **increase mainly refers to Afghan nationals** whose number of detections increased by **167.0%** while detections of all other nationalities decreased in 2019.²³

According to UNHCR at **total of 59,726 refugees and migrants arrived in Greece by sea in 2019 and 14,887 by land**.²⁴ The majority originated from Afghanistan (40%), Syria (27%) and the Democratic Republic of the Congo (7%). In late 2019 about **40,000 refugees were hosted on the Greek islands** that are main entry points for irregular crossings along the Eastern Mediterranean Route.



Source: Frontex

²³ Frontex, detections of illegal border-crossings statistics.

²⁴ UNHCR, Mediterranean Situation, Greece, <https://data2.unhcr.org/en/situations/mediterranean/location/5179>

Notwithstanding this, the significant shift towards detections in the Eastern Mediterranean still **indicates a structural change in irregular migration patterns** to the EU. The 2017 Italy-Libya Memorandum of Understanding, the temporary closing of Italian ports to arrivals via the Central Mediterranean Route throughout 2019 and the bilateral agreements on joint migration control reached between Morocco and Spain in February 2019 had their lasting impacts on irregular migration patterns. This, however, implies **increased pressure on Turkey and Greece** and the functioning of the **18 March Agreement** reached between Turkey and the EU in 2016, which together with the **enhanced cooperation between States along the Western Balkans Route** was and is essential for the decrease in asylum applications in the EU after 2015 / 2016.

The assumption of a structural shift in routes is also confirmed by statistics provided by the Turkish authorities. The Turkish coast guard reported a total of **46,256 apprehensions** in the Aegean Sea by mid October, a **projected annual increase of 90 %** compared to the total number of apprehensions in 2018 (a total of 25,398 apprehensions for the whole year). As regards land borders, the month of September saw an absolute peak with more than 7,000 apprehensions of persons trying to cross to Greece via Turkey.²⁵ By October, Turkish authorities had **apprehended more than 330,000 persons** who had illegally entered the country, implying a **47 % increase** compared to 2018. Although much emphasis is put on the issue of Syrian refugees, the increase in irregular crossings and requests for asylum observed in Turkey and subsequently the EU has to be attributed **mainly to Afghan nationals**. **44 %** of all apprehensions in Turkey referred to citizens from **Afghanistan**.²⁶ The further deterioration of the security situation in Afghanistan as well as the economic situation of the Afghan diaspora in Iran are responsible for this development.

3.2 Asylum applications

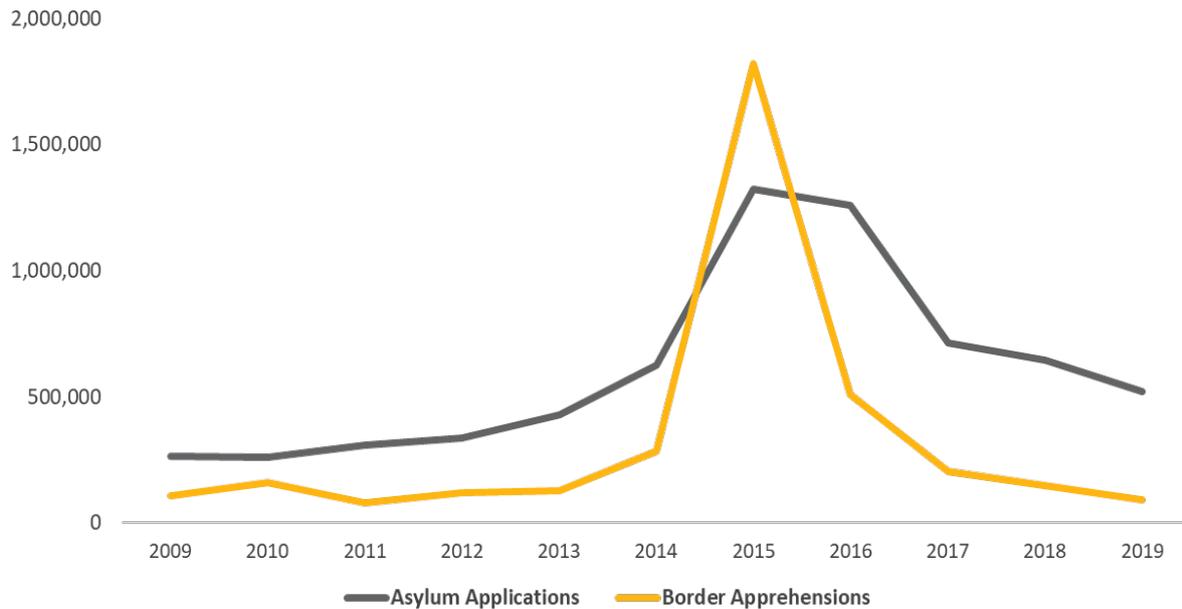
The figures for asylum applications submitted in Member States of the EU in the first ten months of 2019²⁷ suggest that only a share of asylum seekers have been previously registered as illegal arrivals at the EU's external borders. This is in stark contrast to the situation at the peak of the refugee crisis and can be explained by two factors. First, irregular migration patterns have shifted away from sea routes, where arrivals are normally registered, to land routes, where this is less the case. Second, EU Member States impose stricter policies and increasingly emphasise the transfers to first countries of asylum in the EU. Consequently, asylum seekers try to avoid early registration before reaching their desired destinations. The graph below depicts the related trend.

²⁵ Tamer Kilic (ICMPD), Migration Situation in Turkey and Developments related to Syria, Presentation, October 2019.

²⁶ Eric Reidy, Briefing: Behind the new refugee surge to the Greek islands, 30 October 2019, <https://www.thenewhumanitarian.org/news/2019/10/30/refugee-surge-Greek-islands>.

²⁷ Most recent EU-wide figures available at the time of writing.

EU border apprehensions and asylum applications 2009 - October 2019



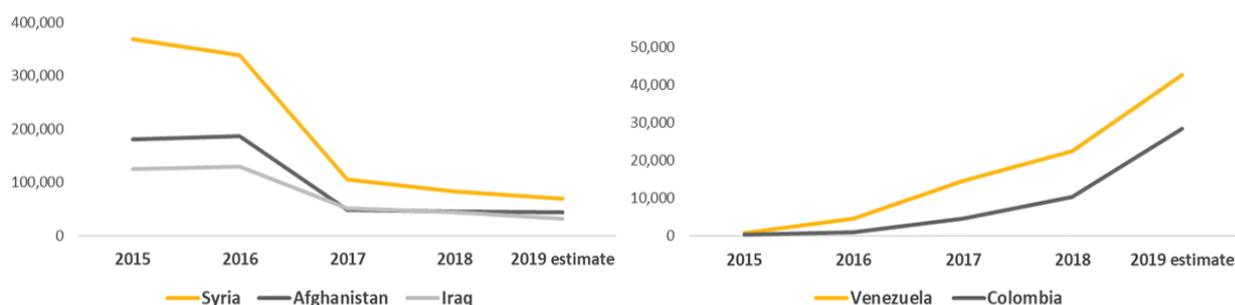
Source: Eurostat, Frontex

Between January and October 2019, a total of **546,725 asylum applications** were submitted in Member States of the European Union.²⁸ This implied an **insignificant increase of 0.8 %** in comparison to the first ten months in 2018. The same applies to first applications, where the increase was 1.0 %. Taking into account that a share of these applications meanwhile apply to children of persons who had arrived in the EU in previous years (Germany reports that 21.8 % of all applications in 2019 refer to children born in Germany) as well as to cases of family reunification, one can assume a **further yet moderate reduction of newly arrived asylum applicants** in comparison to previous years.

This decrease would have been more distinct without the emergence of new asylum migration patterns in 2019. The **three most important countries of origin of asylum seekers** throughout the last couple of years all **showed decreases in 2019, at least in the first ten months of the year: Afghanistan minus 4.9 % applications, Syria minus 16.7 % and Iraq minus 27.6 %**. At the same time, the Latin American displacement crisis started to have a significant impact on asylum applications in the EU. The total number of asylum applications submitted by **Colombian and Venezuelan nationals** increased by **plus 176.2 %** and **plus 89.5 %** respectively. Thus far, asylum seekers from these two countries of origin almost exclusively go to **Spain**, where 89.8 % of all Venezuelans and 90.4 % of all Colombians submitted their asylum application in 2019.

²⁸ Eurostat, asylum and migration statistics, own calculations.

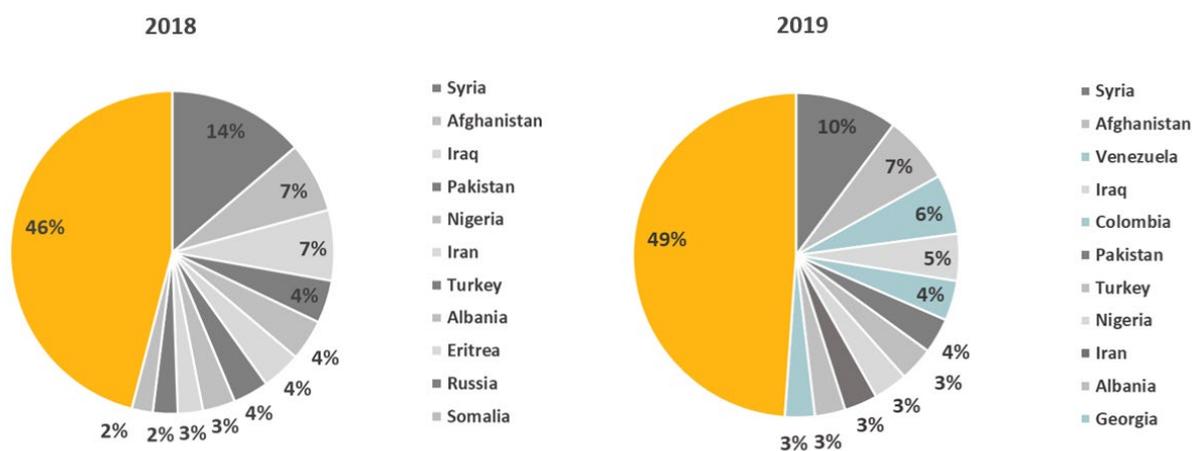
Trends in annual asylum applications in the EU 2015 - 2019



Source: Eurostat

Countries of origin for the applicants in 2019. In the first ten months of 2019, Venezuela ranked third among all countries of origin with a total of 35,550 applications and Colombia fifth with a total of 23,735 applications. Another notable trend was the increase of applications from Georgian nationals. With a total of 16,855 Georgian applications the country ranked eleventh among the most important origins of asylum seekers in the EU in 2019. In total numbers, Syria was the most important country of origin with a total of 60,495 applications followed by Afghanistan (40,130 applications), Venezuela (35,550 applications), Iraq (27,875 applications), Colombia (23,735 applications), Pakistan (20,865 applications), Turkey (20,275 applications), Nigeria (20,215 applications), Iran (19,535 applications), Albania (17,995 applications) and Georgia (17,585 applications).

Trends in annual asylum applications in the EU

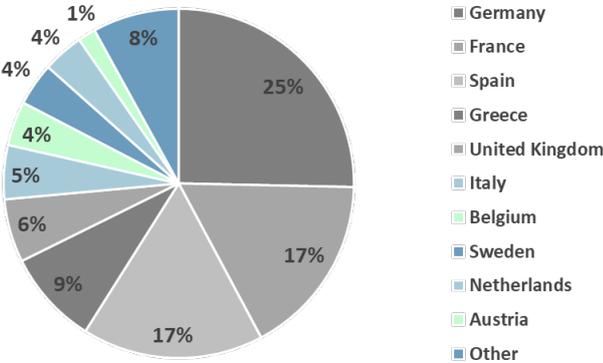


Source: Eurostat

EU countries of destination for the applicants in 2019. Like in 2018, asylum applications were concentrated in a small number of receiving Member States. In the first ten months of the year **74.7% of all asylum applications were submitted in just five EU Member States:** Germany (25.8%), France (17.2%), Spain (17.0%), Greece (8.9%) and the United Kingdom (6.0%). This annual

clustering with at times changing countries of destination confirms a trend that has been observed in the past on a regular basis as well.

Main destinations of asylum seekers in the EU 2019



Source: Eurostat

To sum up and as regards the main irregular migration routes towards Europe, a lot will depend on whether the cooperation arrangements along the Central and Western Mediterranean Routes will hold also in 2020. This can be assumed for the Western Mediterranean Route but is more in question on the Central Mediterranean Route. Should the political situation escalate in Libya, a breakdown of the current cooperation setting is likely. However, should the situation in the Central and Western Mediterranean remain as in 2019, this will also entail continued pressure on the Eastern Mediterranean Route, whose combined sea and land routes are more difficult to control than the other Mediterranean Routes. In this regard, there is considerable risk of an overburdening of Turkey and Greece that would put the 18 March Agreement in jeopardy. International support and relief for Turkey and Greece will be essential to avoid the creation of a breaking point in the overall system. Such a development could always result in a situation comparable to the 2015 crisis.

At first sight, the 2019 asylum trends in the EU developed almost similar to 2018. However, a closer look reveals that there have been notable new developments as well. Although the overall application figures moved within the trends of 2018, the total numbers of applications from the traditionally leading countries of origin Syria, Iraq and – to a lesser degree – Afghanistan all decreased. Three new countries of origin entered the top ranks, namely Venezuela, Colombia and Georgia. In 2019, around 90 % of Latin American asylum seekers went to Spain. For short stay visits (less than 90 days within a period of 180 days), they are exempted from obtaining a Schengen visa and can enter the country easily. In case of a rejected asylum application, the Spanish government regularly grants protected status on humanitarian grounds that allows the beneficiaries to stay and work in the country for a year. A change in admission policy or saturation of the Spanish labour and housing markets might reduce inflows from Latin America in 2020, but might also result in

secondary movements of already resident Venezuelans and Colombians to other EU Member States.

In 2020, the structural causes for asylum migration will remain as in previous years or even intensify. The security and economic situation in the main regions of origin of asylum seekers in Europe will rather worsen than improve. Consequently, there is no reason to believe that the structural demand for flight migration to Europe will go down. Overall figures on irregular arrivals and asylum applications will largely depend on the upholding of the existing cooperation arrangements along all Mediterranean Routes but also on policies towards asylum seekers from Latin American countries. In a best case scenario there will be a further but moderate decrease in asylum and irregular migration statistics. A worst case scenario, i.e. a sharp increase in asylum applications like in 2015, is not the most likely development but cannot be ruled out completely either.

4. Demographic change and labour migration

The migration debate in Europe is dominated by the issues of irregular migration and protection and it is highly unlikely that this picture would change in 2020. At the same time it should not be forgotten that there is a **second, more hidden debate** that in the long run will shape the European just as much. Europe is in the final stages a **second demographic transition** towards a society with low reproduction rates, a significant increase in populations of 65 years or older and a decline in the share of the working age population. According to the main scenario, the population of the EU (including the United Kingdom) will rise slightly to a total of 521 million by 2060.²⁹ At the same time the proportion of **persons in retirement age** will increase from **19% (2015)** to **32% (2060)**, and the proportion of **the population in prime working age** (20 - 64) will decrease **by 16% from 306 million (2015) to 256 million (2060)**. While in 2015 there were 76 people outside working age per hundred people of working age, by 2060 there will be 114 people - mostly pensioners. Population development varies from region to region. Parts of Europe will experience a population decline by 2030, while the population in other parts of Europe will remain stable or grow.³⁰

The long-term effects of demographic ageing on labour force needs is difficult to predict. Technological progress and digitalisation might outweigh the decline in working age population in the long run. For the next ten years, however, most assessments predict **increasing shortages** on many of the European labour markets coupled with an **increasing demand for skilled and highly skilled workers** trained in mathematics, computer science, natural Sciences and technology, but also in the craft sector, the health sector, tourism or the restaurant trade.

²⁹ European Commission/IIASA (2019): European Commission/IIASA , Demographic Scenarios for the EU. Migration, Population and Education. Luxembourg (Publications Office of the European Union), doi: 10.2760/590301, p. 1.

³⁰ Berlin Institute (2017): Berlin Institute for Population and Development 2017: Europe's Demographic Future. Where the Regions are Headed after a Decade of Crisis. Berlin, p. 15.



Sources: Manpower Group, ICMPCD

Emerging shortages are increasingly felt on European labour markets, which also increases the pressure on governments to consider openings in the area of labour migration from third countries. In November 2019, for instance, France announced its plan to introduce quotas or targets for legal economic migrants. Other European countries already apply points-based quota systems, sometimes in combination with an occupations list, and intend to broaden the scope of their systems. In August, **Germany** adopted the **new Skilled Workers' Immigration Act** to promote selective and increased immigration of skilled workers from third countries. The new German law has the quality of a **game-changer** as it does not apply the principle of a shortage occupation list but permits admission of third country nationals who have a university degree or completed vocational training equivalent to German standards.

Thus far, European States have been less successful than other OECD countries in attracting skilled migrants and mere openings of legal opportunities will not change that picture. Europe has highly specialised and formalised labour markets with requirements which are difficult to meet for many migrants. Future immigrants will have to be better qualified than previous cohorts as a result of the expected technological transformation and decreasing demand for low-skilled work on European labour markets. Therefore, recruitment from third countries will only work when **European vocational training standards are exported** to partner countries in form of **skills partnerships**. Such partnerships are still in their early conceptual phases and it will take some more time before they are implemented in practice.³¹

³¹ ICMPCD, *Breaking Gridlocks and Moving Forward. Recommendations for the next five years of EU migration policy*, Vienna 2019, p. 26

Demographic and economic transformations have a gradual yet continuous impact. In 2020 Europe will see a growing public and political debate on the issue of labour migration from third countries. Depending on the overall economic climate, labour shortages in specific sectors and occupations might grow and the pressure on government policies to address these shortages by openings for third country nationals might intensify as well. European migration policies will face the challenge to make a **clearer distinction between skilled and other types of migration** and to communicate more clearly why it might be needed in the future.

5. Brexit

On 9 January, the British Parliament agreed the Brexit Withdrawal Bill, implying that the UK will leave the European Union on 31 January. This date will also mark the beginning of a transition period until the end of the year which should define the future relationship between the UK and the EU. As regards EU migration, the transition period will be a phase will be one of standstill preserving the current status quo. The real change will come in 2021 when free movement should end for UK and EU nationals. Notwithstanding this, the issue of post-Brexit migration will affect the EU already in 2020. It can be expected that the Eastern and Western Members of the EU attach different levels of importance to the issue, with the prior having large emigrant populations working in the UK. The post-Brexit status of EU workers in the UK might turn into a bargaining chip in the negotiations also over other issues like goods and services and cause additional divisions between EU Member States. This will also pose a challenge for the new Commission to ensure unity among the Member States over a migration topic, this time linked to legal and labour migration issues within the former EU 28.

6. Political developments in the EU

Last year's outlook had assumed that in view of the persisting contradictions and differences of opinion among the Member States particularly on the issues of solidarity and responsibility sharing and the European elections in May, the year 2019 would be a rather lacklustre year regarding migration policy reforms in the EU. Already in 2018, the reform of the Dublin System in direction of mandatory distribution quotas had finally failed as much as all attempts to rescue the Dublin Reform by a series of proposed compromises that would have softened the obligations regarding an obligatory distribution key. The reform had been brought to a standstill that lasted throughout the whole of 2019.

In July, the European Council nominated Ursula von der Leyen as the new European Commission President. On 27 November the European Parliament approved the new Commission. Immediately after her nomination, Ms. von der Leyen made clear that migration will be one of the absolute priorities of her presidency. In this regard she called for a **fresh start** and proposed a **New Pact on Migration and Asylum**. As cornerstones of the New Pact she defined a relaunch of the Dublin reform of asylum rules, the development of a "truly common" European Asylum System,

the reinforcement of the European Border and Coast Guard Agency, enhanced cooperation with countries hosting large refugee populations, the establishment of humanitarian corridors, the fight against human smugglers, a stronger commitment to resettlement, more pathways for legal migration, a system of employment opportunities for skilled workers and a more sustainable approach to search and rescue.³² Early November Ms. Von der Leyen announced that the **draft proposal for the New Pact** should be **presented in the first or second quarter of 2020**.

At least one of these milestones has been already reached. On 8 November, the Council adopted the Commission's proposal to **reinforce the European Border and Coast Guard** and to provide the necessary funds for it. Frontex will have a standing corps of 10,000 border guards, a stronger mandate on returns and for closer cooperation with non-EU countries also beyond the immediate neighbourhood.

There was also progress in the area of **search and rescue**. The **Malta Declaration from 23 September** laid down the commitment of Germany, France, Italy and Malta towards a temporary solidarity mechanism on a voluntary basis, applicable to persons disembarked following SAR operations in the high seas, and falling under the responsibility of Italy and Malta.³³ Asylum seekers should then be relocated to participating Member States according to pre-declared pledges. The Malta Declaration called on other EU and Schengen Member States to join the mechanism but was met with cold reception by most of them. They criticised that the Declaration only covered the Central Mediterranean route while the bulk of irregular arrivals took place in the Eastern Mediterranean, left out the Member States currently affected the most by inflows, and implied a relocation of persons also in case they are not found to be in need of protection in the asylum procedure after relocation.

A **recent proposal by the German Minister of the Interior** addresses these issues. It proposes to conduct the **screening of applications at the EU external borders** and **according to a common and single set of rules**. Depending on the outcome of this screening, the applicants should either be **returned** to their home country or directly **distributed among EU Member States upon pre-defined responsibilities**. Applicants should receive social assistance only in the responsible Member State. The system should be based on the principle of **flexible solidarity**, meaning that Member States which are not ready to accept refugees under the scheme contribute by financial means or by staff pledges to Frontex. The idea of controlled centres at the external borders is not new and it remains to be seen whether they can gather the support by a sufficient number of Member States this time and whether the emerging coalition of willing states manages to develop a system that “goes beyond declarations of intent”³⁴ like in previous attempts. In order to find

³² Ursula von der Leyen, Candidate for President of the European Commission, A Union that strives for more. My agenda for Europe, Political Guidelines for the Next European Commission 2019 – 2024, p. 15.

³³ Sergio Carrera and Roberto Cortinovis, the Malta declaration on SAR and relocation: A predictable EU solidarity mechanism? CEPS Policy Insights, p. 4.

³⁴ Julian Lehmann, All Quiet on the Brussels Front? Published By Internationale Politik und Gesellschaft 02 Oct 2019, <https://www.gppi.net/2019/10/02/all-quiet-on-the-brussels-front>.

approval, such a system has to include binding commitments towards the Member States at the external borders who are exposed the most to irregular inflows.

Based on the declared intentions of the new Commission and recent developments of this autumn, it can be expected that 2020 will give a new impetus to the debate on the reform of the Common European Asylum System. Like in the past, the **questions of solidarity and responsibility sharing and the reform – or replacement – of the Dublin regulation will be both centrepiece and main obstacle in this process**. The Malta Declaration and the proposals regarding a screening of asylum applications at the EU external borders raise some hope that things might start to move again after the standstill of 2018/2019. However, they also suggest that progress will be incremental and the trend towards **different speeds** and **coalitions of the willing**, i.e. intergovernmental instead of within-EU Treaty approaches, will continue. Thus, it is obvious that the New Pact on Migration and the other initiatives under discussion will have their effects, even if agreed in 2020, only in the following years.

7. Conclusions for 2020

Size and direction of international migration flows depend on the impact of a number of main drivers like conflict, globalisation, changing technologies and means of communication, demographic developments, socio-economic development and increasingly environmental factors and climate change. Together these drivers form the global and long-term migration climate in which regional and annual developments are embedded in. Over time, their impact of intensifies rather than weakens.

The latest estimates speak about **272 million international migrants**, representing **3.5 % of the world's population** and an **increase of 5.4 %** in comparison to the 258 million international migrants from 2017. Mainly responsible for this growth is the driver **conflict**. Between 1993 and 2018 the number of globally displaced more than doubled from 21.4 million to 70.8 million. Also for 2020, a migration outlook will have to assume that flight and displacement continue to constitute a large or even increasing share among international migration flows.

In 2020 **no breakthrough is expected** in terms of the **security** and **economic situation** for the most important regions and countries of origin of forced and irregular migration to the EU and Turkey (**Syria, Afghanistan and Iraq**). Furthermore, the **displacement crisis in Latin America** worsens at a rapid pace and meanwhile matches the crisis in the Eurasian and African regions in size and urgency. Traditionally, the U.S. were the main destination for displaced persons from Latin American countries outside their immediate neighbourhoods. However, the strict immigration policies introduced by the Trump administration made it increasingly difficult for forced migrants from Latin America to reach the U.S. A small share of forced migrants from Latin American countries has sought other alternatives. This conclusion can be drawn from the recent increases in asylum applications from citizens of Latin American countries in Europe.

The security situation also worsened in a key partner for Europe in addressing irregular migration across the Mediterranean. The military offensive launched by the Libyan National Army (LNA) in April triggered the largest mobilisation of fighters since the revolution in 2011. A military stalemate followed and peace talks started in 2020. In the best case, this year will see early steps towards conflict resolution but all sides know that a successful outcome of the peace process is anything but certain. Should the conflict escalate it will result in even sharper rifts in the country, which would also jeopardize the cooperation with the EU on migration along the Central Mediterranean Route. Regarding the main forced migration and irregular migration routes towards Europe, a lot will depend on whether these cooperation arrangements along the Central and Western Mediterranean Routes will hold also in 2020. This can be assumed for the Western Mediterranean Route but due to the situation is more in question on the Central Mediterranean Route. Should the political situation escalate in Libya, a breakdown of the current cooperation setting is likely.

However, should cooperation in the Central and Western Mediterranean hold, this will entail **continued** and possibly **even increasing pressure on the Eastern Mediterranean Route** in 2020. Here, the combined sea and land routes make it structurally more difficult to control movements than on the other Mediterranean Routes. In this regard, there is considerable risk of an overburdening of Turkey and Greece that would put the 18 March Agreement in jeopardy. **European Union and international support and relief for Turkey and Greece will be essential** to avoid the creation of a breaking point in the overall system. Subsequently, such a development could always result in a situation comparable to the 2015 crisis.

Also for 2020 there is no reason to believe that the structural demand for flight migration will decrease. In a best case scenario there will be a further but moderate decrease in asylum and irregular migration statistics. A worst case scenario, i.e. a systemic shock the overall system like in 2015, is not the most likely development but cannot be ruled out completely.

Although also in 2020 most attention will be on issues related to forced and irregular migration, Europe will see a **growing public and political debate** on the issues of **demographic developments, labour market needs and labour migration from third countries** as well. Depending on the economic climate, labour shortages in specific sectors and occupations might grow and the pressure on government policies to address these shortages by openings for third country nationals might intensify as well. Thus, European migration policies will face the challenge to make a **clearer distinction between skilled and other types of migration** and to communicate more clearly why the prior might be needed in the future.

Due to the gridlock that had befallen European Union policy making in the area of migration and protection and the European elections from May, 2019 did not see too much progress in this policy area. Based on the declared intentions of the new Commission and recent developments of this autumn, it can be expected that 2020 will give a new impetus to the debate on the reform of the Common European Asylum System. Like in the past, the **questions of solidarity and responsibility**

sharing and the reform – or replacement – of the Dublin regulation will be both centrepiece and main obstacle in this process. The Malta Declaration from September and the very recent proposals from Germany regarding a screening of asylum applications at the EU external borders raise some hope that things might start to move again after the standstill of 2018/2019. However, they also suggest that progress will be incremental and the trend towards **different speeds** and **coalitions of the willing**, i.e. “intergovernmental” instead of “within-EU Treaty” approaches, will continue. Thus, it is obvious that the New Pact on Migration promised by the new European Commission and the other initiatives under discussion will have their effects, even if agreed in 2020, only in the following years.

The **long-term priorities for European migration policy**, also laid down in ICMPD’s recommendations on “Breaking Gridlocks”,³⁵ do not change in 2020: renew a common vision for the future of international protection for Europe and beyond, secure borders and safeguard Schengen, make return policies and practices more effective, create better functioning and proactive labour market policies, focus on immigrant integration, integrate the Western Balkan countries into Europe’s regional migration system, invest in migration partnerships and broaden cooperation agendas with partner countries, and apply a whole-of-migration-routes approach.

2020 should continue to focus on the support of countries hosting large refugee populations and populations of internally displaced. Main priority must be given to the situation on the Eastern Mediterranean Route and to support for Greece and Turkey and the upstream countries along the Western Balkans Route. Finally, the EU Member States should not miss the year to work on joint and function solutions for the reform of the Common European Asylum System. In a volatile migration environment, a failure in addressing weaknesses can backfire at any time.

³⁵ ICMPD, Breaking Gridlocks and Moving Forward. Recommendations for the next five years of EU migration policy, Vienna 2019

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