ICMPD

International Centre for Migration Policy Development

ICMPD
Migration Outlook
2020

10 things to look out for in 2020

Origins, key events and priorities for Europe

Ten things to look out for in 2020

2020 will be another challenging year for EU migration policy. Below is a non-exhaustive list of trends and developments that will be high on the agenda of decision-makers and analysts alike.

1. The situation in main countries and regions of origin

As with previous years, 2020 will again see the migration situation in the wider European region shaped by developments in the conflict areas in the Near and Middle East and in African regions. In addition, the major displacement crisis in Latin America, which started to affect Europe in 2019, will continue to do so this year. For 2020, most geopolitical outlooks expect continued or growing instability in these regions. Consequently, there is no reason to believe that migration pressures towards Europe will decrease this year.

2. Irregular migration as the main theme of the European debate

Again in 2019, the migration debate in Europe was dominated primarily by issues surrounding irregular migration and asylum and this picture will not change this year. At the same time, the effects of demographic ageing are increasingly felt on European labour markets and employers have started to push for more openings on labour migration. European governments will face the challenge of drawing a clearer distinction between skilled and other types of migration and of communicating more clearly why the former might be needed in the future.

3. Secondary movements towards Europe

2019 has seen an increase in irregular and asylum migration, particularly of Afghan nationals towards Turkey and the EU. Thus, many of these migrants are not moving from their home country but from countries in the region hosting large refugee populations. Iran for instance hosts about 3 million Afghans. Their economic situation has deteriorated significantly due to the sanctions imposed on the country. The Turkish government's plan to establish a safe zone in Syria to resettle Syrian nationals might also prompt secondary movements to the EU. These trends will continue in 2020 and pose additional challenges for EU asylum and return policies.

4. The prospects of a peace process in Libya

The European migration situation always depends on the situation in Libya as a main point of departure for asylum seekers and irregular migrants from African countries but also other regions headed towards Europe. The recently initiated peace process gives some hope to believe that the EU

– Libya cooperation on migration control will hold again in 2020, limiting the number of departures to Europe via the Central Mediterranean Route.

5. The Eastern Mediterranean Migration Route as the main hotspot

Last year saw a further shift in irregular migration routes towards the Eastern Mediterranean. Given the situation in the main regions of origin of related flows and assuming that cooperation agreements will hold along the Western and Central Mediterranean Routes, the Eastern Mediterranean Migration Route will be the main hotspot for migration management for the EU and its partners in 2020.

6. The migration situation in Turkey and Greece

Both countries faced mounting pressures in 2019 linked to the large numbers of refugees and displaced they already host and the increasing numbers of refugees and migrants crossing their territories with the aim of reaching the Northern and Western Member States of the EU. In 2020, the EU will have to provide the greatest possible support at all levels and by all means to Turkey and Greece to prevent them from being overburdened and to preserve the EU – Turkey Statement.

7. Secondary movements within the EU

The movement of asylum seekers from the first Member State where they submit their application to others Member States is a general problem for the European system. Last year saw a peak in applications of nationals from Latin American countries in the EU. Thus far, about 90 % of these applications were submitted in Spain. Given the bleak outlook in the Latin American countries of origin, forced migration from these countries to Europe is likely to continue. A saturation of the Spanish labour and housing market could prompt secondary movements of Latin American nationals to other EU Member States.

8. The new EU Pact on Migration and Asylum

The new Commission plans to present the outline of the new Pact for the European Summit in March. The Pact envisages ambitious agenda items, amongst others the development of a truly European Asylum System. Member States are, however, far apart on the issues of solidarity, burden sharing and a mechanism for the distribution of asylum seekers. It remains to be seen whether the Commission can overcome the stalemate around these issues and bring Member States closer together again. If this difficult goal can be achieved, the Pact could start showing real effects next year.

9. The German proposal on asylum screening at the external borders.

Germany has proposed an approach that could re-launch intra-EU cooperation on asylum issues and irregular migration. The idea is to screen asylum applications at the external borders, return inadmissible cases immediately and distribute the remaining applicants among Member States based on a yet to be agreed distribution key. Access to an asylum procedure and to social benefits would be available only in the responsible Member State.

If built up gradually, a system of this kind could indeed incentivise EU cooperation and de-incentivise irregular arrivals. 2020 will show whether the plan can gather support from a enough Member States to go beyond declarations of intent and include credible commitments towards the Member States at the external borders.
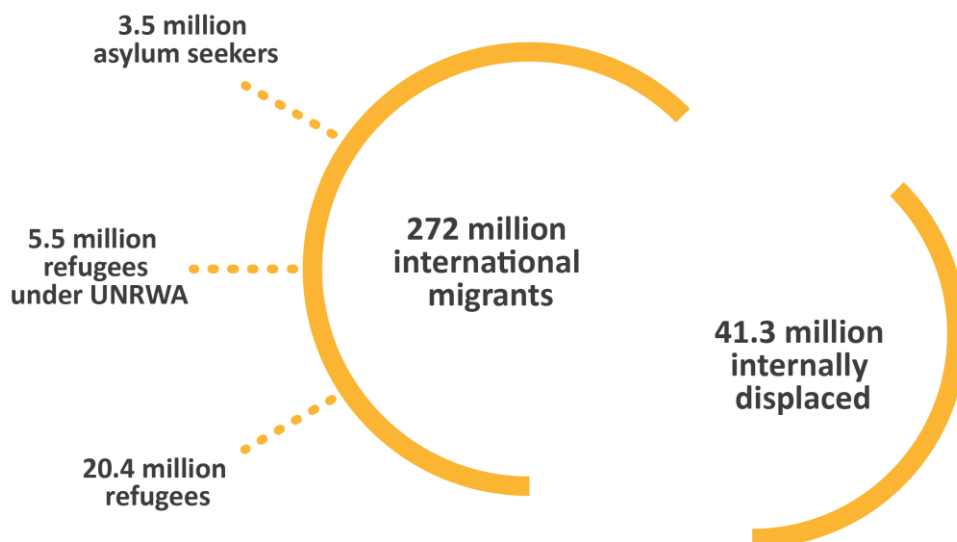
10. Brexit and the status of EU and UK migrants

2020 will preserve the current status quo. The real change will come in 2021 when free movement is slated to end for EU and UK citizens. Nonetheless, the post-Brexit status of these migrants might turn into a bargaining chip in the Brexit negotiations already this year and divide the EU Member states who attach different levels of significance to the issue. Thus, the new Commission might face some challenges to preserve unity among all Member States over the issue.

Introduction

ICMPD's Migration Outlook presents a **brief analysis of migration and policy trends** and provides an outlook on developments and events to watch out for in 2020. Thus, the outlook does not claim to foretell the future or to cover all relevant trends. It wants to use past experience and highlight what might happen and is important to consider.

The size and direction of international migration flows depend on the **impact of a number of main drivers**. They are war, civil war and conflict; the globalisation of economies, values and aspirations; changing technologies and means of communication; shifting demographics; socio-economic development; as well as environmental factors and climate change. Together they form the global and long-term migration climate in which regional and short-term developments are embedded. Available statistics confirm the increasing impact of these drivers. The latest estimates speak about **272 million international migrants** in 2019, representing 3.5% of the world's population and an increase of 5.4% in comparison to 2017. The number of international migrants has grown faster than the world's population. Mainly responsible for this growth is the global increase in conflict and violence. Between 1993 and 2018 the number of **globally displaced** more than tripled from **21.4 million** to **70.8 million**; the number of **internally displaced** increased by almost ten times from **4.2 million to 41.3 million**. Internal conflicts lead to the largest numbers of displacement. In 2018, 57% of all refugees worldwide came from Syria, Afghanistan and South Sudan.

Global migration and displacement situation

3.5 million asylum seekers

5.5 million refugees under UNRWA

272 million international migrants

41.3 million internally displaced

20.4 million refugees

Source: UNHCR

Migration hotspots in 2020

As in previous years, the migration situation in the wider European region will be shaped by developments in the conflict areas in the Near and Middle East and in African regions. This does not imply that other world regions deserve less attention or cooperation, but any major and spontaneous migration movements in 2020 will be linked to the situation in these regions. The major displacement crisis in Latin America will affect Europe again in 2020. Due to the geographical distance involved, related inflows might be significant but will not move in the quantitative dimensions of flows originating in the nearer neighbourhood.

Syria

Entering its ninth year of conflict, Syria remains the largest displacement crisis in the world. More than 12 million Syrians are displaced; 6.7 million are refugees, 3.7 million of them in Turkey. Over the last two years the Syrian government has continued to consolidate control and in October the conflict parties started talks on a new constitution. However, it is widely believed that this attempt to end the conflict will not lead to a breakthrough either. Syria is likely to experience new displacement again in 2020. In October, U.S. forces withdrew from northern Syria and the Turkish government announced its plan to establish a safe zone where Syrian refugees can be resettled from Turkey. This plan might trigger secondary movements to the EU, albeit on a rather limited scale.

Afghanistan

With a total 2.7 million refugees, Afghans are the second largest refugee population in the world. Over 88% of these refugees are hosted by neighbouring Pakistan and the Islamic Republic of Iran. In Afghanistan both the security and economic situation have worsened in recent years and 2019 was no exception. The Taliban continued to make territorial gains and the peace process has come to a halt. Civilian casualties reached the highest number in years and growing violence caused an increase in the total number of internally displaced persons (IDPs) to 2.1 million as well as economic decline and even higher unemployment. In 2020, these developments will increase the potential for growing levels of flight and irregular migration from Afghanistan itself and secondary movements from Pakistan and Iran towards Turkey and the EU.

Iraq

Mass protests have put the government under severe pressure and analysts expect some concessions in the area of social welfare expansion in 2020. Nonetheless, there are 1.8 million IDPs and returnees in Iraq. In conjunction with the bleak economic prospects, they form a considerable potential for emigration. The US strike that 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.

Iran

About 3 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. 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 pose one of the main challenges for European migration policy in 2020.

Libya

Libya hosts a mixed migration population that includes refugees, labour migrants, internally displaced persons (IDPs), and migrants in transit towards Europe. According to IOM there are about 667,000 migrants in Libya, many of them with no income opportunities. UNHCR counts about 43,000 registered refugees and 217,000 returnees; 1.3 million people are in need of humanitarian assistance. Notwithstanding serious human rights concerns, the 2017 Memorandum of Understanding (MoU) between Libya and Italy, the 2017 Malta Declaration and the cooperation with the Libyan Coast Guard remain fundamental building blocks of EU attempts to control irregular migration. 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. Both sides to the conflict have agreed to participate in a UN ceasefire committee but are not yet willing to negotiate directly with each another. 2020 will see early steps towards conflict resolution but all sides know that a successful outcome of the peace process is anything but certain. If the conflict escalates, 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.

African countries

UNHCR reports 23 active refugee situations for Africa and a total of 6.3 million African refugees and 17.7 million IDPs. These situations involve not only large numbers, but also include refugee flows both from and to a country with large-scale internal displacement. South Sudan remained the largest refugee situation again in 2019. An estimated 2.2 million South Sudanese refugees have been displaced to Sudan, Uganda, Ethiopia, Kenya and the Democratic Republic of Congo; an additional 1.8 million are considered internally displaced. There are 870,00 Somali refugees in the Horn of Africa and Yemen and 2.1 million IDPs in Somalia itself. With 905,000 persons, Ethiopia hosts the second largest refugee population in Africa. The Democratic Republic of Congo hosts 539,000 refugees but also reports 4.5 million internally displaced. Sudan hosts 1.1 million refugees and 1.9 million IDPs while Nigeria reports 1.9 million IDPs.

For 2020, geopolitical outlooks expect continued or growing instability for several African countries, namely the Democratic Republic of Congo, Somalia, Burkina Faso, Mali, Niger, South Sudan, the Central African Republic, and Burundi. Against this backdrop and even though the share of African nationals among asylum seekers in Europe is smaller than that of nationals from other regions like the Middle East, Asia and Europe itself, related trends are not expected to decrease in 2020. Much 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 initiated peace process gives some hope to believe that the EU – Libya cooperation on migration control will continue to hold in 2020.

Latin America

Somewhat unnoticed by the European debate, a displacement crisis evolved in Latin America that matches the crises in other world regions in size and urgency. Today, there are more than 12 million displaced, twice as many as in 2013. Forced displacement in Latin America is mainly caused not by state persecution but by organised crime, food insecurity, state fragility, and collapse of livelihoods. Traditionally, the U.S. was a safe haven for a small share of Latin American refugees but the strict immigration policies introduced by the Trump administration have limited this option. They also shifted flows towards the EU. Analysts do not expect that the tensions existing throughout the region will ease this year. It can be assumed that the numbers of displaced in Latin America will increase further and that 2020 will see migration towards Europe continue in keeping with the recently emerging pattern.

Migration trends in the EU

Again in 2019, the migration debate in Europe was dominated mainly by issues surrounding **irregular migration and asylum**. Two sets of indicators reflect related developments: the **detections of illegal border-crossings** and the total numbers of **asylum applications** submitted in the EU.
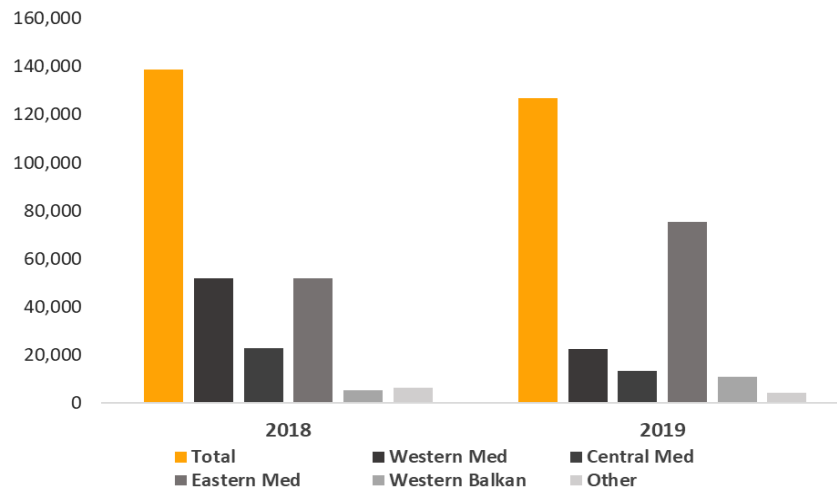
Irregular migration and asylum applications

In 2019, Frontex registered more than **139,000 illegal crossings** at the external borders of the EU. This indicates a **decrease of 6% in comparison to 2019** and a decrease of 92% in comparison to the peak of 1.82 million illegal border crossings in 2015. The overall trend, however, has not reduced the pressure on all routes. In 2020, the detections shifted further away from the Central and Western Routes towards the **Eastern Mediterranean Route**. There, the **number of detections increased by 46.0%** in comparison to 2019. Notably, the trends in detections did not involve all nationalities in similar ways. A break-down by nationality reveals that the **increase mainly stems from Afghan nationals**, whose number of detections increased by **167.0%** while detections of all other nationalities decreased in 2019.

According to UNHCR a **total of 59,726 refugees and migrants arrived in Greece by sea in 2019**. The majority originated from Afghanistan (40%), Syria (27%) and the Democratic Republic of the Congo (7%). Currently about **40,000 refugees are hosted on the Greek islands** that are main entry points for irregular crossings along the Eastern Mediterranean Route.
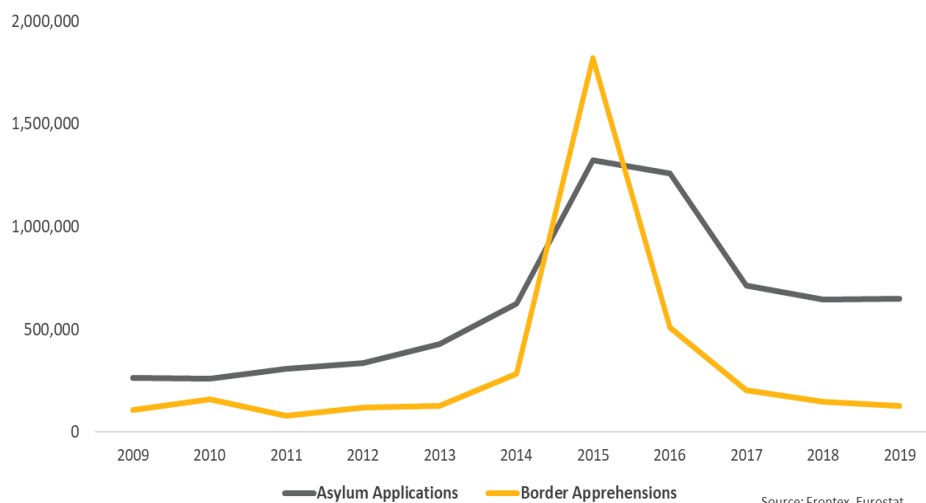
Detections of illegal border crossings 11/2018 and 11/2019

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 **46,000 apprehensions in the Aegean Sea** by mid-October, a projected annual **increase of 90%** compared to the total number of apprehensions in 2018. Inside the country there was a 47% increase in apprehensions 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 must be attributed mainly to Afghan nationals. 44 % of all apprehensions in Turkey involved citizens from Afghanistan.
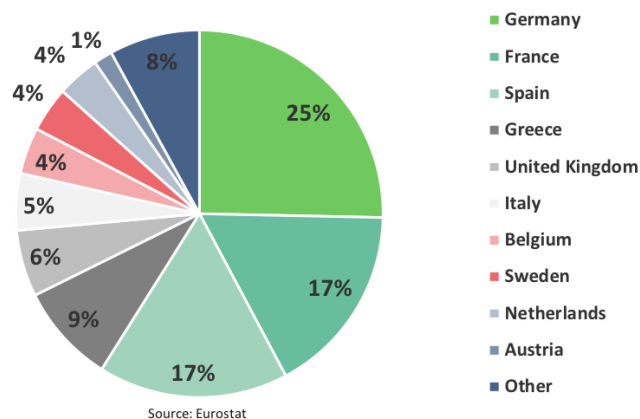
EU border apprehensions and asylum applications 2009 - 2019

Source: Frontex, Eurostat

Application figures in the EU suggest that only a minority of asylum seekers were 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 but 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.

In **2019, more than 714,000 asylum applications** were submitted in Member States of the European Union. This represents an **increase of 13% in comparison 2018**. Final figures for the EU as a whole will be available in March 2020. Below figures refer to the most recent country statistics available at the time of writing. Given that a considerable share of applications in 2019 involved children whose parents arrived in the EU in previous years (Germany reports that 21.8% of all applications in 2019 are for children born in Germany) and are cases of family reunification, one can assume that there would have been a decrease in applications without the emergence of new patterns in 2019. The three most important countries of origin of asylum seekers throughout the last couple of years, **Afghanistan, Syria and Iraq, showed decreases in 2019**. At the same time, the **Latin American displacement crisis** started to have a significant impact on asylum applications in the EU. The total
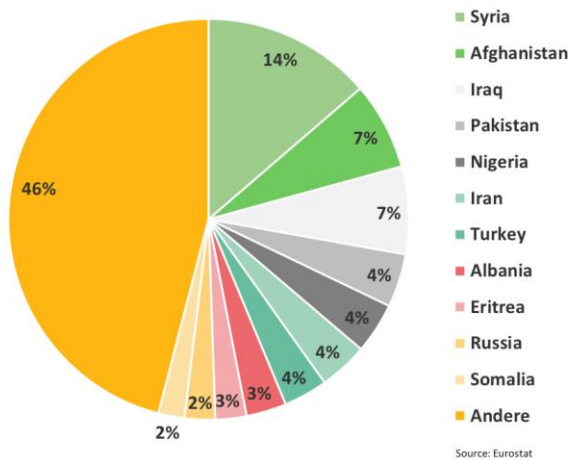

Main destinations of asylum seekers in the EU 2019

Legend: Germany, France, Spain, Greece, United Kingdom, Italy, Belgium, Sweden, Netherlands, Austria, Other
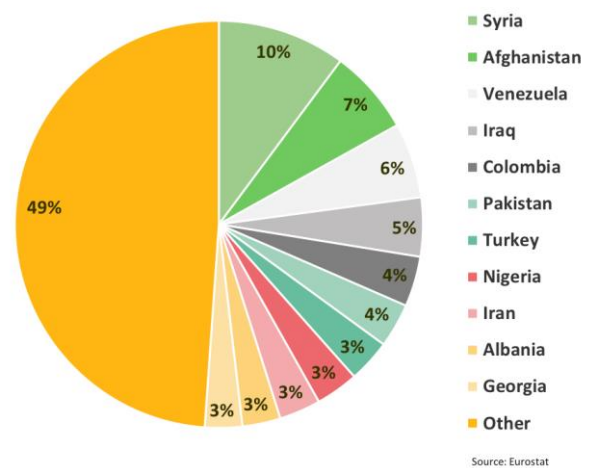
Source: Eurostat

number of asylum applications submitted by **Colombian** and **Venezuelan** nationals increased by **176.2%** and **89.5%** respectively. Thus far, almost 90% of the asylum seekers from these two countries go to Spain. The latest figures show that Spain received a total of 118,200 asylum applications in 2020, with 96% of these applications submitted by nationals from Latin America. In light of the bleak prospects for the situation in Latin America, this trend can be expected to continue in 2020 and result in increasing shares of **secondary movements from Spain to other EU Member States**.

As in previous years, applications were concentrated in a small number of Member States. **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%).

Total asylum applications in the EU 2018

46%	
14%	■ Syria
7%	■ Afghanistan
7%	Iraq
4%	■ Pakistan
4%	■ Nigeria
4%	■ Iran
4%	■ Turkey
3%	■ Albania
3%	■ Eritrea
2%	■ Russia
2%	Somalia
	■ Andere

Source: Eurostat

Total asylum applications in the EU Jan - Oct. 2019

49%	
10%	■ Syria
7%	■ Afghanistan
6%	Venezuela
5%	■ Iraq
4%	■ Colombia
4%	■ Pakistan
3%	■ Turkey
3%	■ Nigeria
3%	■ Iran
3%	■ Albania
3%	Georgia
	■ Other

Source: Eurostat

Labour migration and Brexit

The European debate is dominated by the issues of irregular migration and protection and this picture will not 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 debate just as much. Europe is undergoing **demographic and economic transformations that are having a gradual yet continuous impact on the economic and political systems**. The long-term effects of demographic ageing are difficult to predict. For the next ten years, however, most assessments predict increasing skills shortages coupled with an increasing demand for skilled workers trained in MINT professions, but also in the craft and health sector, tourism or the restaurant trade. Emerging shortages are increasingly felt on European labour markets, which also increases the pressure on governments to consider opening up labour migration from third countries. In 2020 Europe will see a continued public and political debate and European governments will face the challenge of making a clearer distinction between skilled and other types of migration and to communicate more clearly why the former might be needed in the future.

On 9 January, the British Parliament agreed the **Brexit Withdrawal Bill**, paving the way for the UK to leave the European Union on 31 January. This date will also mark the beginning of a transition period until the end of the year, during which the future relationship between the UK and the EU will be defined. As regards EU migration, the transition period will be a phase of standstill preserving the current status quo. The real change will come in 2021 when free movement is slated to end for UK

and EU nationals. Nonetheless, the issue of post-Brexit migration will already affect the EU in 2020. The Eastern and Western Members of the EU can be expected to attach different levels of importance to the issue, with the former 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 on other matters such as goods and services and cause additional divisions among EU Member States. This situation will also pose a challenge for the new Commission to ensure unity among the Member States on the migration issue, this time linked to the sub-issues of legal and labour migration within the former EU 28.

Migration policy developments in the EU

2019 was a slow year for migration policy reforms in the EU due to persisting disagreements on the issues of solidarity and responsibility-sharing and due to the European elections in May. However, the new Commission has made it clear that migration will be one of its absolute priorities. It called for a fresh start and proposed a **New Pact on Migration and Asylum**. Cornerstones are a relaunch of the Dublin reform, the development of a "truly common European Asylum System", the reinforcement of Frontex, enhanced cooperation with countries hosting large refugee populations, the establishment of humanitarian corridors, the fight against human smugglers, resettlement, more pathways for legal migration, and a new approach to search and rescue. An overarching goal is to increase the EU-wide return rate, i.e. the number of third-country nationals returning upon a leave order, which currently stands at 41.5%. Vice President Schinas announced that the outline of the Pact should be ready by the EU summit of 25 and 26 March.

One of the envisaged milestones has already been reached. In November 2019, the Council agreed to **reinforce the European Border and Coast Guard Frontex** and to provide the funds necessary for this task. Frontex will have a standing corps of 10,000 border guards as well as a stronger mandate on returns and on closer cooperation with non-EU countries beyond the neighbourhood. There was also progress in the area of search and rescue. The Malta Declaration from September laid down the commitment of Germany, France, Italy and Malta to a temporary solidarity mechanism on a voluntary basis.

In autumn, a **new initiative by the German Minister of the Interior** revived the debate. It proposes screening the applications at the EU external borders in accordance with a common set of rules. Depending on the outcome of the screening, applicants would either be returned or directly distributed among Member States based on pre-defined responsibilities. Applicants would receive social assistance only in the responsible Member State. The idea of controlled centres at the external borders is not new and it remains to be seen whether the plans gather enough support to go beyond declarations of intent. In order to function, a system of this kind will have to include binding commitments towards the Member States at the external borders who are most heavily exposed to irregular inflows.

Conclusions for 2020

The impact of the main drivers of international migration is not expected to decrease this year. A migration outlook for 2020 will again have to assume that flight and displacement will continue to constitute a large or even increasing share of international migration flows. No breakthrough can be expected in the security and economic situation in the major regions and countries of origin of forced and irregular migration to the EU. Furthermore, the displacement crisis in Latin America will rapidly worsen, unleashing forced migration flows to Europe as well.

Regarding the main routes to Europe, much will depend on whether cooperation arrangements along the Central and Western Mediterranean Routes hold in 2020. This can be assumed for the Western Route but the outcome for the Central Route is less predictable. However, if the cooperation arrangements in the Central and Western Mediterranean do hold, the this will entail **continued or even increasing pressure on the Eastern Mediterranean Route**. There, the combined sea and land routes make it more difficult to control movements than on the other Routes. In this regard, there is considerable **risk of overburdening Turkey and Greece,** which would put the EU – Turkey Statement from 2016 under additional pressure. European Union 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. 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 to the European system like in 2015, is not the most likely development but cannot be ruled out either.

Based on the declared intentions of the new Commission and Member States, 2020 will give **fresh impetus to the debate on the reform of the Common European Asylum System**. As in the past, the questions of solidarity and responsibility-sharing and the future of the Dublin Regulation will be both centrepieces and primary obstacles in this process. The Malta Declaration from September and the recent proposals from Germany to screen asylum applications at the EU external borders raise some hope that things might start to move again after the standstill of 2018/2019. However, these developments also suggest that progress will be incremental and the trend towards different speeds and coalitions of the willing will continue. Thus, it is obvious that, if agreed in 2020, the New Pact on Migration and other initiatives will show effects only in the years to follow.

In 2020, the EU and the Member States should pursue **two parallel strands**. They should be prepared to **set measures that tackle short-term developments** and **continue their mid- to long-term work on reforming the overall European system**.

They need to continue to focus on supporting the countries hosting large refugee populations and populations of internally displaced. Top priority must be given to the **situation on the Eastern Mediterranean Route** and to support for Greece and Turkey as well as the upstream countries along the Western Balkans Route and in Africa.

The **long-term priorities for European migration policy**, also laid down in ICMPD's own recommendations on "Breaking Gridlocks", will not change in 2020: Renew a common vision on international protection, secure borders and safeguard Schengen, make return policies more effective, create proactive labour market policies, focus on integration of immigrants, integrate the Western Balkan countries into Europe's migration system, invest in migration partnerships with partner countries, and apply a whole-of-migration-routes approach. The EU Member States should not pass up the opportunity this year to work on joint and functional solutions for reforming the European migration system. In a volatile migration environment, a failure to address weaknesses can backfire at any time.